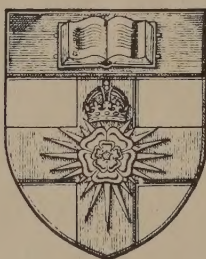


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ACCOUNTS AND PAPERS:

FORTY-SEVEN VOLUMES.

— (35.) —

COMMERCIAL REPORTS.

Session

12 *March* 1894 — 25 *August* 1894.

VOL. LXXXV.

ACCOUNTS AND PAPERS:

1894.

FORTY-SEVEN VOLUMES:—CONTENTS OF THE THIRTY-FIFTH VOLUME.

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1894.
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No. 1450.

DIPLOMATIC AND CONSULAR REPORTS ON TRADE
AND FINANCE.

AFRICA.

REPORT FOR THE YEAR 1892-93

ON THE

TRADE, &c., OF THE INDEPENDENT STATE
OF THE CONGO.

Presented to both Houses of Parliament by Command of Her Majesty,
AUGUST, 1894.

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AFRICA.

Sir F. Plunkett to the Earl of Kimberley.

My Lord, *Brussels, July 7, 1894.*

I HAVE the honour to transmit herewith a Report on the Trade and Navigation of the Independent State of the Congo for the year 1892 and the First Six Months of 1893, which has been prepared by Mr. Adam.

I have, &c.
(Signed) F. R. PLUNKETT.

Report on the Trade and Navigation of the Independent State of the Congo for the Year 1892 and the First Six Months of 1893.

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Total exports
for 1892.

The total exports of the Independent State of the Congo (including foreign goods in transit) during the year 1892 amounted to 6,053,877 kilos. (about 5,958½ tons avoirdupois), valued at 7,529,979 fr. 68 c. (301,199*l.* 3*s.* 9*d.*).

Of this total amount the exports of actual produce of the Independent State were 4,371,038 kilos., or 4,302 tons avoirdupois, the estimated value of which was 5,487,632 fr. 89 c. (219,505*l.* 6*s.* 3*d.*).

Comparison with 1891.

When compared with the corresponding figures for 1891, the value of the total exports shows a falling-off in 1892 of 3,005,639 fr. 57 c. (120,225*l.* 11*s.* 8*d.*), but, on the other hand, that of the actual products of the Independent State rose from—

Year.	Value.					
	Currency.			Sterling.		
	Francs	c.		£	s.	d.
1891.. .. .	5,353,519	37		214,140	15	6
1892.. .. .	5,487,632	89		219,505	6	4
Net increase	134,113	52		5,364	10	10

Value and
destination of
goods
exported.

The accompanying table shows the total value of goods exported from the Congo in 1892, including those in transit from French and Portuguese possessions, together with the countries to which the goods were exported :—

TABLE showing Value of the Goods Exported from the Independent State of the Congo during the Year 1892, and their Distribution according to their Immediate Destination.

COUNTRIES OF ORIGIN OF THE GOODS.

Description.	Value.				
	Currency.		Sterling.		
	Francs	c.	£	s.	d.
A.—INDEPENDENT STATE.					
Lower Congo (including the region between the coast and Stanley Pool, together with that of Zobe, on the Chiloango)	1,848,040	89	73,921	12	8
Upper Congo	3,639,592	0	145,583	13	7
Total of home produce	5,487,632	89	219,505	6	3
B.—FOREIGN COUNTRIES.					
French possessions—					
On Upper Congo	52,000	0	2,080	0	0
Along the coast	20,221	12	808	17	0
Above Manyanga	93,340	0	3,733	12	0
Portuguese possessions—					
On left bank of the Congo	1,139,618	32	45,584	14	6
Along the sea coast	737,167	35	29,486	14	0
Total	7,529,979	68	301,199	3	9

COUNTRIES TO WHICH THE GOODS WERE SHIPPED.

Country.	Value.				
	Currency.		Sterling.		
	Francs	c.	£	s.	d.
Belgium	2,949,149	88	117,966	0	0
Holland	2,501,535	94	100,061	8	9
French possessions—					
On the Upper Congo	917,408	0	36,696	6	5
Portuguese possessions—					
Along the sea coast	673,981	31	26,959	4	10
Germany	206,598	66	8,263	18	11
Portuguese possessions—					
On left bank of the Congo	178,515	74	7,140	12	8
Great Britain	85,829	79	3,433	3	10
France	16,063	54	642	10	10
Portugal	896	82	35	17	6
Total	7,529,979	68	301,199	3	9

The general total of exports during the first 6 months of 1892 amounted to 2,045,476 kilos., or 2,013 $\frac{13}{80}$ tons, valued at 1892
(1828)

Comparative statement of exports during the first and
A 3

second half-
years of 1892,
and the first
6 months of
1893. 3,258,122 fr. 80 c. (130,324*l.* 18*s.* 3*d.*), and during the last 6 months to 4,008,401 kilos., or 3,945 $\frac{7}{10}$ tons, valued at 4,271,856 fr. 88 c. (170,874*l.* 5*s.* 6*d.*); while the corresponding amounts for the first 6 months of 1893 were respectively 3,008,350 kilos., or 2,960 $\frac{2}{10}$ tons, valued at 3,838,409 fr. 40 c. (153,536*l.* 7*s.* 6 $\frac{1}{2}$ *d.*).

The actual products of the Congo State during the same periods of time entered into the above totals for 1,602,569 kilos., or 1,577 $\frac{1}{4}$ tons, worth 2,519,406 fr. 8 c. (100,776*l.* 4*s.* 10*d.*) during the first half-year of 1892; for 2,768,469 kilos., or 2,724 $\frac{3}{4}$ tons, worth 2,968,226 fr. 81 c. (118,729*l.* 1*s.* 5*d.*) during the second half-year; and for 2,594,360 kilos., or 2,553 $\frac{3}{8}$ tons, worth 3,134,947 fr. 48 c. (125,397*l.* 18*s.*) during the first half year of 1893.

Principal
articles of
export. The principal articles of export consisted of coffee (in transit from the Portuguese possessions along the coast and on the left bank of the Congo), indiarubber, palm oil, ivory, and palm nuts.

Coffee.

The total exports of coffee during 1892 amounted to 216,937 kilos. (213 $\frac{1}{2}$ tons), valued at 309,786 fr. 4 c. (12,391*l.* 8*s.* 9*d.*). Of this—

From—	Quantity.		Value.	
			Currency.	Sterling.
	Kilos.	Tons.	Francs c.	£ s. d.
Portuguese possessions on the left bank of the Congo	77,257	76	110,323 0	4,412 18 4
Along the coast	139,680	137 $\frac{1}{2}$	199,463 4	7,978 10 5

Out of the above total no less than 209,206 kilos. (nearly 206 tons), worth 298,746 fr. 17 c. (11,949*l.* 16*s.* 10*d.*), were shipped to Holland.

The quantities exported during the first and second half-years of 1892, and their respective values, were :—

	Quantity.		Value.	
			Currency.	Sterling.
	Kilos.	Tons.	Francs c.	£ s. d.
1st half-year	69,662	68 $\frac{1}{2}$	99,477 34	3,979 1 10
2nd half-year	147,275	145	210,308 70	8,412 6 11

while the coffee exported (in transit) during the first 6 months of 1893 amounted only to 48,789 kilos. (about 48 tons), valued at 69,670 fr. 69 c. (2,786*l.* 16*s.* 7*d.*).

Intended
plantations in
the interior. In anticipation of the completion of the railway between Matadi and Stanley Pool, attention is being turned to the prospects of coffee culture on the Upper Congo. The coffee tree is known to exist in a wild state in some of the northern provinces, and there

is abundance of land suited to its growth. The Congo Government has begun to form plantations in the neighbourhood of several of its stations, including Léopoldville, Bangala, and Basoko, while the "Société du Haut Congo" has instructed its agents to prepare for coffee-growing on a large scale as soon as the railway shall furnish the means of transporting the crops to the sea. Most of the coffee sown hitherto has been from Liberia, but experiments are about to be tried with beans from San Thomé.

With regard to indiarubber, the total exportation for 1892 Indiarubber. amounted to 460,399 kilos. (453 tons), valued at 1,841,596 fr. (73,663*l.* 16*s.* 10*d.*).

Of this the produce of Congo Free State amounted to—

	Quantity.		Value.		
			Currency.	Sterling.	
	Kilos.	Tons.	Francs c.	£	s. d.
Produce of Congo State ..	156,339	154	625,356 0	25,014	4 10
From lower Congo ..	86,236	85	344,944 0	13,797	15 3
From its upper course..	70,103	69	280,412 0	11,216	9 7

Of the remainder, the following furnished—

	Quantity.		Value.		
			Currency.	Sterling.	
	Kilos.	Tons.	Francs c.	£	s. d.
Portuguese possessions on left bank	210,895	207½	843,580 0	33,743	4 0
Portugese seaboard ..	89,020	87½	356,080 0	14,243	4 0
French sea-coast territories	4,145	4	16,580 0	663	4 0

The shipments amounted to—

To—	Quantity.		Value.		
			Currency.	Sterling.	
	Kilos.	Tons.	Francs c.	£	s. d.
Holland.. ..	316,492	311½	1,265,968 0	50,638	14 5
Belgium	56,488	55½	225,952 0	9,038	1 5

For the first half-year of 1892 the total export of indiarubber (including foreign produce in transit) was—
(1828)

	Quantity.		Value.		
			Currency.	Sterling.	
	Kilos.	Tons.	Francs c.	£	s. d.
Total export	182,873	180	731,492 0	29,259	13 7
Produce of Congo Free State	62,680	62	250,720 0	10,028	16 0

The corresponding amounts for the second half-year were respectively—

	Quantity.		Value.		
			Currency.	Sterling.	
	Kilos.	Tons.	Francs c.	£	s. d.
Total export	277,526	273	1,110,104 0	44,404	3 3
Congo produce.. ..	93,659	92	374,636 0	14,985	8 10

While for the first 6 months of 1893 the total export amounted to—

	Quantity.		Value.		
			Currency.	Sterling.	
	Kilos.	Tons.	Francs c.	£	s. d.
Total export	251,977	248	1,007,908 0	40,316	6 5
Produce of Independent State	116,301	114½	465,204 0	18,608	3 2½

The indiarubber plant is found in all parts of the Independent State of the Congo, but at present the gum is collected chiefly in the basins of the Ubangi-Uelle, Mongalla, and Kassai rivers. The following statement, from the "Indépendance Belge," shows the quantities and values of the indiarubber actually produced in the Congo State, and exported thence between 1887 and 1891:—

Quantities
exported since
1887.

Year.	Quantity.		Value.		
			Currency.	Sterling.	
	Kilos.	Tons cwt. qrs. lbs.	Francs.	£	s. d.
1887	30,050	29 11 2 0	116,768	4,670	14 5
1888	74,294	73 2 1 18	260,029	10,401	3 2
1889	131,113	129 0 3 10	458,895	18,355	16 0
1890	123,666	121 14 1 0	556,497	22,259	17 7
1891	81,680	80 7 3 4	326,720	13,068	16 0

Natives gathering rubber on the public lands of the State are required to give up one-eighth of their crop as a tax. This may be commuted (in the case of European traders) for a payment of 25 c. per kilo. of rubber.

An export duty of 40 fr. per 100 kilos. is also charged.

On other commodities, export duties are likewise imposed by the Royal Decree of April 30, 1892, which came into operation on June 15 of the same year, viz :—

On—	Per 100 Kilos.	
	Fr.	c.
Arachis nuts	1	35
Coffee	9	35
Red copal	8	25
White copal (inferior in quality) ..	1	50
Palm oil	2	75
Palm nuts	1	40
Sesamum	1	25
Ivory—		
<i>a.</i> Pieces	100	00
<i>b.</i> Tusks weighing less than 6 kilos. ..	160	00
<i>c.</i> Tusks over 6 kilos. in weight ..	210	00

The total export of palm oil during 1892 amounted to—

Export of
palm oil.

	Quantity.		Value.	
			Currency.	Sterling.
	Kilos.	Tons cwts. qrs. lbs.	Francs c.	£ s. d.
Total export	1,194,189	1,175 6 2 4	569,628 15	22,735 2 6
Of this the produce of the Independent State (Lower Congo region) was ...	906,295	891 19 2 12	432,302 71	17,292 2 2

The remainder came from the Portuguese possessions, namely :—

	Quantity.		Value.	
			Currency.	Sterling.
	Kilos.	Tons cwts. qrs. lbs.	Francs c.	£ s. d.
Left bank of the Congo ...	213,393	210 0 1 22	101,788 46	4,071 10 9
Atlantic seaboard	74,501	73 6 1 26	35,536 98	1,421 9 7

This shows a considerable falling-off from 1891, when the total export of palm oil was—

	Quantity.		Value.	
			Currency.	Sterling.
	Kilos.	Tons cwts. qrs. lbs.	Francs c.	£ s. d.
Total export	2,272,111	2,236 4 1 26	1,226,939 94	49,077 11 11
Of which the produce of the Independent State was ...	1,573,192	1,548 6 3 14	849,523 68	33,980 18 11

The total export for the first half-year was—

	Quantity.		Value.		
			Currency.	Sterling.	
	Kilos.	Tons cwts. qrs. lbs.	Francs c.	£	s. d.
Total export	353,640	848 1 0 9	168,686 28	6,747	9 0
Of which the actual produce of the independent State was	299,575	294 16 3 13	142,897 27	5,715	17 10

The corresponding amounts for the second half-year were—

	Quantity.		Value.		
			Currency.	Sterling.	
	Kilos.	Tons cwts. qrs. lbs.	Francs c.	£	s. d.
Total export	840,649	827 5 1 23	400,941 87	16,037	13 6
Produce of independent State	606,720	597 2 2 27	289,405 44	11,576	4 4

And for the first half-year of 1893—

	Quantity.		Value.		
			Currency.	Sterling.	
	Kilos.	Tons cwts. qrs. lbs.	Francs c.	£	s. d.
Total export	531,732	523 6 2 19	253,636 16	10,145	8 11
Of which the actual Congo- lese produce was	458,057	450 16 1 22	218,493 19	8,739	14 6

The principal countries to which the oil was shipped during 1892 were—

Countries.	Quantity.	
	Kilos.	Tons cwts. qrs. lbs.
Holland	478,572	471 0 1 1½
The Portuguese coast possessions ..	350,120	344 11 3 5
Belgium	176,608	173 16 1 13
Great Britain	160,356	157 16 1 24

The total export of ivory during 1892 was—

Ivory.

	Quantity.		Value.	
			Currency.	Sterling.
	Kilos.	Tons cwts. qrs. lbs.	Francs.	£ s. d.
Total export	195,291	192 4 0 14	3,905,820	156,282 16 0
Of this the actual produce of the Congo State was	186,521	183 11 2 0	3,730,420	149,216 16 0

the remainder (8,779 kilos.) being in transit from the French and Portuguese territories.

For 1891 the corresponding amounts had been—

	Quantity.		Value.	
			Currency.	Sterling.
	Kilos.	Tons cwts. qrs. lbs.	Francs.	£ s. d.
General total	165,905	163 5 2 21	3,318,100	132,724 0 0
Of which the Congo State supplied	141,775	139 10 2 23	2,835,500	113,420 0 0

Of the entire export of ivory the following went to—

	Quantity.		Value.	
			Currency.	Sterling.
	Kilos.	Tons cwts. qrs. lbs.	Francs.	£ s. d.
Belgium	126,535	124 10 2 25	2,530,700	101,228 0 0
French possessions on the Upper Congo	41,040	40 7 3 9	820,800	32,832 0 0

The quantities of ivory from the Congo and Central Africa imported into Antwerp during the past 6 years are stated by the “Mouvement Géographique,” as follows :—

Quantities
exported to
Antwerp
since 1888.

Year.		Quantity.	
		Kilos.	Tons cwts. qrs. lbs.
1888	..	6,400	6 5 3 25
1889	..	46,600	45 17 1 4
1890	..	77,500	76 5 2 2
1891	..	59,500	58 11 0 23
1892	..	118,000	116 2 2 25
1893	..	224,000	220 9 0 27
Total	..	532,000	523 11 3 22

The sudden increase during the last 2 years is, in a great measure, attributable to the considerable number of exploring and trading expeditions which have been at work during that period.

The total export of ivory for the first 6 months of 1892 was—

	Quantity.		Value.	
			Currency.	Sterling.
	Kilos.	Tons cwts. qrs. lbs.	Francs.	£ s. d.
Total export	97,863	96 6 0 16	1,957,060	78,282 8 0
Of which was home produce	93,449	91 19 1 23	1,868,980	74,759 4 0

For the last 6 months of the same year, the total export amounted to—

	Quantity.		Value.	
			Currency.	Sterling.
	Kilos.	Tons cwts. qrs. lbs.	Francs.	£ s. d.
Total export	97,438	95 17 3 26	1,948,760	77,960 8 0
Home produce	93,072	91 12 0 5	1,861,440	74,457 12 0

The corresponding amounts for the first 6 months of 1893 were respectively—

	Quantity.		Value.	
			Currency.	Sterling.
	Kilos.	Tons cwts. qrs. lbs.	Francs.	£ s. d.
Total export	102,272	100 13 0 15	2,045,440	81,817 12 0
Actual Congolese produce...	101,238	99 12 2 27	2,024,720	80,988 16 0

Palm nuts.

The total export of palm nuts for 1892 was—

	Quantity.		Value.	
			Currency.	Sterling.
	Kilos.	Tons cwts. qrs. lbs.	Francs c.	£ s. d.
Total export	3,799,094	3,739 1 3 3	839,599 77	33,583 19 9
From the Lower Congo districts of the Independent State	3,064,747	3,016 6 3 7	677,309 9	27,092 7 3
From the Portuguese possessions	731,265	719 14 1 5	161,609 56	6,464 7 8
The French Congo	3,082	3 0 2 19	681 12	27 4 10

This shows a great falling-off from the exports of 1891—

	Quantity.				Value.		
					Currency.	Sterling.	
	Kilos.	Tons cwts. qrs. lbs.			Francs c.	£	s. d.
Produce of the Congo State	4,714,763	4,640	5	3 17	1,320,133 64	52,305	6 11
Transit trade from the Portuguese possessions...	1,623,353	1,602	12	3 3	455,940 24	18,237	12 2
From the French Congo ...	315,280	310	6	0 0	88,278 40	3,531	2 9
Total export	6,653,401	6,553	4	2 20	1,864,352 28	74,574	1 10

Of the palm nuts exported in 1892, there were shipped to—

	Quantity.				Value.		
					Currency.	Sterling.	
	Kilos.	Tons cwts. qrs. lbs.			Francs c.	£	s. d.
Holland	1,712,102	1,686	0	3 15	378,595 54	15,143	16 5
Portuguese possessions ...	1,395,303	1,373	5	1 5	308,361 96	12,334	9 7
Belgium	456,852	449	12	2 25	100,964 29	4,038	11 5
Germany	128,860	195	14	0 20	43,945 85	1,757	16 8

For the first 6 months of 1892 the total exports of palm nuts were—

	Quantity.				Value.		
					Currency.	Sterling.	
	Kilos.	Tons cwts. qrs. lbs.			Francs c.	£	s. d.
Total exports	1,310,740	1,290	0	2 27	239,673 54	11,586	18 10
Of which the Congolese produce was	1,129,589	1,111	14	3 22	249,639 17	9,985	11 4

For the second 6 months of 1892 the general total was—

	Quantity.				Value.		
					Currency.	Sterling.	
	Kilos.	Tons cwts. qrs. lbs.			Francs c.	£	s. d.
General total	2,488,354	2,449	1	0 4	549,926 23	21,997	0 11
Of which were from the Congo State	1,935,168	1,904	6	3 7	427,669 92	17,105	15 11

The corresponding amounts during the first half-year of 1893 were—

	Quantity.		Value.	
			Currency.	Sterling.
	Kilos.	Tons cwt. qrs. lbs.	Francs c.	£ s. d.
General total	2,034,084	2,001 19 0 14	449,532 56	17,981 6 0
Congo produce	1,907,088	1,876 19 1 8	421,466 45	16,858 13 2

Other articles of export. The remaining articles exported from the Congo in 1892 consisted of arachis nuts, red and white copal, sesamum, orchilla, arnotto, cotton, other vegetable fibres, beans, kola nuts, raw hides, and piassava, amounting altogether to—

	Quantity.		Value.	
			Currency.	Sterling.
	Kilos.	Tons cwt. qrs. lbs.	Francs c.	£ s. d.
Total export	187,967	184 19 3 24	63,549 72	2,541 19 9
Of which the actual produce of the Independent State was	57,136	56 4 2 19	22,245 9	889 16 1

Customs duties on imports, established from May 9, 1892. The collection of customs duties on imports into the Independent State of the Congo began on May 9, 1892, in accordance with the provisions of the Protocol signed at Lisbon with the French and Portuguese Governments, on April 8 of that year, and the Decree of the King-Sovereign dated the following day.

The duty on arms, ammunition, gunpowder, and salt is fixed at 10 per cent. ad valorem; that on spirits at 50 degrees at 15 fr. (12s.) per hectolitre.* Other goods pay 6 per cent. ad valorem.

Temporary exemptions. Ships and boats, steam engines, machinery and tools intended for industrial or agricultural purposes, are admitted duty free for a period of 4 years from the introduction of the tariff.

Locomotive engines, rolling stock, and railway material are admitted duty free during the period of construction of the line, until its opening for traffic.

Scientific instruments, church furniture, clothes, and personal luggage belonging to travellers or settlers in the State, as well as live stock of all kinds, and seeds intended for agriculture are likewise on the free list.

Total value of imports, May to December, 1892. The total value of imports between May 9 and December 31, 1892 (including goods in transit or in bond), amounted to 5,679,195 fr. 16 c. (227,167*l.* 16*s.* 2*d.*), out of which the goods imported for consumption within the Independent State represented a value of 4,984,455 fr. 15 c. (199,378*l.* 4*s.* 2*d.*).

The accompanying table shows the value of the imports during the same period, according to their countries of origin :—

* 1 hectolitre = 22 imperial gallons.

COMPARATIVE Table showing the Value of Goods Imported into the Independent State of the Congo between May 9 and December 31, 1892.

Countries of Origin.	General Total.		Goods declared for Consumption.	
	Currency.	Sterling.	Currency.	Sterling.
	Francs c.	£ s. d.	Francs c.	£ s. d.
Belgium... ..	1,973,539 80	78,941 11 10	1,913,288 76	76,531 11 0
Great Britain	1,616,684 28	64,677 7 5	1,511,111 68	60,444 9 6
Holland	781,711 25	31,268 9 0	561,977 46	22,479 1 11
Germany "	711,328 12	28,453 2 6	410,972 77	16,438 18 2
Portugal	177,649 66	7,105 19 8	174,546 8	6,981 16 10
Portuguese seaboard possessions	108,471 96	4,338 17 6	108,471 96	4,338 17 6
France	91,558 59	3,662 6 11	90,188 19	3,607 10 6
Walvisch Bay (British possession)	83,950 0	3,388 0 0	83,950 0	3,358 0 0
Italy	36,840 8	1,473 12 1	36,840 8	1,473 12 1
China	32,628 75	1,305 3 0	32,628 75	1,305 3 0
Portuguese possessions (left bank of Congo)	25,137 92	1,045 10 4	22,001 17	880 0 11
Spain (Canary Islands)	12,307 54	492 6 1	12,307 54	492 6 1
Cape of Good Hope	11,779 68	471 3 9	11,779 68	471 3 9
Austria-Hungary	10,636 20	427 16 2	10,478 80	419 3 0
Switzerland	1,435 20	57 8 2	1,435 20	57 8 2
United States	1,153 40	46 2 9	1,153 40	46 2 9
Spain	700 0	28 0 0	700 0	28 0 0
Tunis	282 57	11 6 1	282 57	11 6 1
Denmark	171 0	6 16 10	171 0	6 16 10
Greece	126 56	5 1 3	126 56	5 1 3
Grand Duchy of Luxembourg	43 50	1 14 10	43 50	1 14 10
Total	5,679,195 16	227,167 16 2	4,984,465 15	199,378 4 2

The principal articles of importation fall under the following heads:—

Live animals valued at 141,996 fr. 50 c. (5,679*l.* 17*s.* 2*d.*), of which 56,850 fr. (2,274*l.*) for horned cattle imported from the Portuguese sea-coast possessions; 80,250 fr. (3,210*l.*) for horned cattle; and 3,700 fr. (148*l.*) for sheep from the British possessions of Walvisch Bay.

Arms, ammunition, and accoutrements, of a total value of 456,300 fr. 37 c. (18,252*l.* 0*s.* 7½*d.*). Out of this sum 256,577 fr. 71 c. (10,263 2*s.* 2*d.*) were for trade gunpowder, of which 313,956 kilos. (nearly 309 tons) were imported; 238,258 kilos. (234½ tons), worth 197,502 fr. 12 c. (7,900*l.* 1*s.* 8*d.*), were intended for consumption in the Independent State.

Of ordinary and blasting powder the import was 7,294 kilos. (7 tons 13 cwt. 3 qrs.), valued at 5,298 fr. 67 c. (211*l.* 18*s.* 11*d.*).

The small arms imported were: 2,181 flint-lock muskets, worth 22,156 fr. 73 c. (886*l.* 5*s.* 4*d.*); 2,551 percussion guns, worth 24,429 fr. (977*l.* 3*s.* 2*d.*); and 2,804 guns of improved systems, worth 33,164 fr. 75 c. (1,326*l.* 11*s.* 10*d.*).

Of the flint-lock muskets 1,278 were declared for immediate use, 303 were declared in transit, and 600 were declared for storage in bond; while of the percussion guns, 2,535 were for immediate use, and only 16 in transit. The whole of the improved fire arms were for immediate use.

There were also 8 cannon valued at 29,857 fr. 40 c. (1,194*l.* 5*s.* 11*d.*).

The import of cartridges amounted to 377,301, valued at 41,582 fr. 88 c. (1,663*l.* 6*s.* 3*d.*), and the value of the accoutrements was 25,825 fr. 21 c. (1,033*l.* 0*s.* 2*d.*).

*Boats, Engines, Tackle, and parts of Boats.*Boats,
engines, and
parts of boats.

The imports under this head were 284,689 fr. 50 c. (11,387*l.* 11*s.* 7*d.*), of which 110,000 fr. (4,400*l.*) was the value of steamboats; 30,642 fr. 68 c. (1,225*l.* 14*s.* 2*d.*) represented duplicate parts of machinery and spare boilers, while 43,772 fr. (1,750*l.* 17*s.* 7*d.*) was for sailing ships and boats, and 75,673 fr. 80 c. (3,026*l.* 19*s.* 2*d.*) for detached parts of boats.

*Fermented and Spirituous Liquors.*Beer, wines,
and spirits.

The value of the total importation of beer was 57,156 fr. 20 c. (2,286*l.* 4*s.* 11*d.*).

The total amount of trade spirits below 50 degrees proof imported was 767,523 litres (168,929 gallons), valued at 292,512 fr. 77 c. (11,700*l.* 10*s.* 2*d.*), of which 489,329 litres (107,699 gallons 7 pints), valued at 190,001 fr. 85 c. (7,600*l.* 1*s.* 5*d.*), were declared for direct consumption or taken out of bond.

Of trade spirits above 50 degrees proof, the total import was 169,625 litres (37,333 gallons 7 pints), valued at 98,757 fr. 44 c. (3,950*l.* 5*s.* 11*d.*), of which 145,533 litres (32,031 gallons 3 pints), valued at 83,443 fr. 39 c. (3,337*l.* 14*s.* 8*d.*), were for direct consumption.

The countries from which the largest quantities of spirits below 50 degrees proof were imported were—

Country.	Quantity.	
	Litres.	Galls. pts.
Germany	562,056	123,706 7
Holland	145,534	32,031 4½
Belgium	39,030	8,590 3
Great Britain	16,367	3,602 1

While for spirits over 50 degrees proof the chief importers were—

Country.	Quantity.	
	Litres.	Galls. pts.
Germany	140,841	30,998 5
Belgium	13,908	3,061 0
Great Britain	13,429	2,955 5

The value of other spirits and liqueurs imported was: 27,640 fr. 2 c. (1,105*l.* 12*s.*), and that of wines: 137,546 fr. 33 c. (5,501*l.* 17*s.*); bringing the total importation under the head of alcoholic drinks to 613,612 fr. 76 c. (24,544*l.* 10*s.* 2½*d.*).

Provisions and Food Stuff's (including Salt for barter).

The total importation amounted in value to 871,742 fr. 35 c. Provisions.
(34,869*l.* 13*s.* 10*d.*), of which—

From—	Value.	
	Currency.	Sterling.
	Francs c.	£ s. d.
Belgium	348,799 19	13,951 19 4
Great Britain	232,961 78	9,218 9 5
Germany	68,267 17	2,730 13 9

Tinned provisions represented a value of 417,538 fr. 8 c.
(16,701*l.* 10*s.* 5*d.*), of which—

From—	Value.	
	Currency.	Sterling.
	Francs c.	£ s. d.
Great Britain	155,484 6	6,219 7 3
Belgium	127,540 19	5,101 12 1
Germany	52,130 0	2,085 4 0
Holland	49,677 97	1,987 2 4
France	20,610 24	824 8 2

Of flour—

From—	Value.	
	Currency.	Sterling.
	Francs c.	£ s. d.
Belgium	96,768 87	3,870 7 1
Great Britain	18,402 68	736 2 2
Holland	12,218 85	488 15 0

out of a total of 131,645 fr. 69 c. (5,265*l.* 16*s.* 7*d.*).

Peas, beans, and grain amounted to 11,195 fr. 59 c. (447*l.* 16*s.* 5*d.*),
of which 9,781 fr. 6 c. (391*l.* 4*s.* 10*d.*) came from Belgium.

Dried fish was imported for a sum of 70,684 fr. 17 c.
(2,827*l.* 7*s.* 4*d.*), of which—

From—	Value.	
	Currency.	Sterling.
	Francs c.	£ s. d.
Portuguese coast possessions ..	45,419 14	1,816 15 4
Belgium	10,798 72	431 19 0

Potatoes and onions form a separate subhead, of which the value is given at 20,430 fr. 41 c. (817*l.* 4*s.* 3*d.*), of which—

From—	Value.	
	Currency.	Sterling.
	Francs c.	£ s. d.
Canary Islands	10,032 38	401 5 11
Belgium	5,169 29	206 15 5

The imports of rice were valued at 173,643 fr. 24 c. (6,945*l.* 14*s.* 7*d.*), of which no less than 102,632 fr. 42 c. (4,105*l.* 5*s.* 11*d.*) represent the shipments from Belgium, while 24,500 fr. worth (980*l.*) came direct from China.

The value of the salt imported for barter was 36,730 fr. 88 c. (1,469*l.* 4*s.* 8*d.*), of this 30,666 fr. 28 c. (1,226*l.* 13*s.*) represent the shipments from England.

Miscellaneous provisions amounted to 9,874 fr. 29 c. (394*l.* 19*s.* 5*d.*).

Earthenware and Pottery.

Earthenware. The total importation under this head amounted to 51,583 fr. 41 c. (2,063*l.* 6*s.* 9*d.*), out of which—

From—	Value.	
	Currency.	Sterling.
	Francs c.	£ s. d.
Great Britain	28,489 75	1,139 11 10
Holland	11,273 40	450 18 9
Belgium	4,646 28	185 17 0

Clothing and Linen.

Clothing, &c. The total value imported was 184,385 fr. 68 c. (7,375*l.* 8*s.* 7*d.*) of which—

From—	Value.	
	Currency.	Sterling.
	Francs c.	£ s. d.
Belgium	88,975 42	3,559 0 4
Great Britain	49,432 29	1,977 5 10
Holland	28,082 70	1,123 6 2

Machinery, Tools, and Metallic Buildings.

Machinery, tools, and metallic buildings, of a total value of 257,722 fr. 61 c. (10,308*l.* 18*s.* 1*d.*), under the respective headings of—

Machinery,
tools, and
metallic
constructions.

Description.	Value.	
	Currency.	Sterling.
	Francs c.	£ s. d.
Sundry machines and pieces of mechanism	20,001 39	800 1 1
Accessories and reserve parts of machinery	23,475 27	939 0 3
Railway rolling stock	118,037 80	4,721 10 3
Sundry tools	33,443 44	1,337 14 9
Telegraph and telephone apparatus and materials	1,788 29	71 10 8
Sundry metallic structures	60,976 42	2,439 1 1

Of the sundry machines, &c., the value imported was—

From—	Value.	
	Currency.	Sterling.
	Francs c.	£ s. d.
Germany	4,033 0	161 6 5
Great Britain	6,527 2	261 1 7
Belgium	8,938 23	357 10 7

Of the supplementary and reserve parts of machines, the value imported from Belgium was not less than 22,350 fr. 37 c. (894*l.* 0*s.* 4*d.*).

The value of the rolling stock imported was—

From—	Value.	
	Currency.	Sterling.
	Francs c.	£ s. d.
Germany	73,459 0	2,938 7 2
Belgium	44,578 80	1,783 3 1

(1828)

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Of the tools, the importation was valued at—

From—	Value.	
	Currency.	Sterling.
	Francs c.	£ s. d.
Belgian	23,296 60	931 17 3
Great Britain	5,474 24	218 19 5

The importation of metallic buildings amounted to—

From—	Value.	
	Currency.	Sterling.
	Francs c.	£ s. d.
Germany	32,008 40	1,280 6 9
Belgium	21,345 0	853 16 0
Great Britain	7,623 2	304 18 4

Building Materials.

Building materials.

Total value of importations, 152,222 fr. 91 c. (6,088*l.* 18*s.* 4*d.*), viz. :—

Articles.	Value.		Of which from—	Value.	
	Currency.	Sterling.		Currency.	Sterling.
	Francs c.	£ s. d.		Francs c.	£ s. d.
Lime	15,657 71	626 6 2	Belgium ...	14,322 99	572 18 5
Cement	49,065 58	1,962 12 8	Belgium ...	46,519 46	1,860 15 7
Miscellaneous	87,499 37	3,499 19 0	Belgium ...	32,681 70	1,307 5 4
			Holland ...	23,485 70	939 8 7
			Great Britain ...	17,835 92	713 8 9

Metals.

Metals.

The total value of the imports of metals was 313,506 fr. 63 c. (12,540*l.* 5*s.* 3*d.*), viz. :—

Articles.	Value.	
	Currency.	Sterling.
	Francs c.	£ s. d.
Steel	66,121 68	2,644 17 4
Copper and brass	132,235 65	5,289 8 6
Tin	82 42	3 5 11
Iron.. .. .	109,760 54	4,390 8 5
Lead	451 65	18 1 4
Zinc.. .. .	4,854 69	194 3 9

The imports of steel consisted of—

Description.	Value.						Remarks.	
	Currency.			Sterling.				
	Francs	c.		£	s.	d.		
Bar steel..	..	2,090	6		83	12	0	} Both of which came wholly from Belgium Of which 11,402 fr. 30 c. (456 <i>l.</i> 1 <i>s.</i> 10 <i>d.</i>) was of Belgian importation
Steel rails	..	49,130	0		1,965	4	0	
Other steel	..	14,901	62		596	1	4	

Of the imports of copper and brass 126,388 fr. 30 c. (5,055*l.* 10*s.* 8*d.*) represented copper and brass wire, of which—

From—	Value.			
	Currency.		Sterling.	
	Francs	c.	£	s. d.
Belgium	65,639	41	2,625	11 6
Great Britain	25,483	96	1,019	7 2
Holland	22,038	0	881	10 5

The iron imports consisted of—

Description.	Value.			
	Currency.		Sterling.	
	Francs	c.	£	s. d.
Iron wire	702	15	28	1 9
Iron joists	3,909	21	156	7 4
Sheet iron	16,508	70	660	6 11
Nails	9,738	27	389	10 7
Sundries	78,902	21	3,156	1 10

The principal importers were for—

Description.			Value.			
			Currency.		Sterling.	
			Francs	c.	£	s. d.
Iron joists	Belgium	.. ..	3,143	88	125	15 1
Sheet iron	Belgium	.. ..	12,752	49	510	2 0
Nails	Belgium	.. ..	4,410	33	176	8 3
	Great Britain	.. ..	3,396	11	135	16 11
	Holland	.. ..	1,695	25	67	16 2
Sundry iron goods ..	Belgium	.. ..	65,593	33	2,623	14 6
	Great Britain	.. ..	11,631	53	465	5 3

*Cutlery and Ironmongery.*Cutlery and
ironmongery.

Cutlery and ironmongery (including kitchen and household utensils, and miscellaneous articles of trade, *e.g.*, copper and iron bangles, "machetes," mirrors, &c.). Total importation, 173,708 fr. 7 c. (6,948*l.* 6*s.* 6*d.*).

The chief importing countries were—

Country.	Value.	
	Currency.	Sterling.
	Francs c.	£ s. d.
Great Britain	69,317 99	2,772 14 5
Belgium	36,709 57	1,468 7 8
Germany	28,870 19	1,154 16 2
Holland	22,464 20	898 11 4

Cotton Tissues.

Cottons.

The total value of cotton goods imported was 1,442,391 fr. 95 c. (57,695*l.* 13*s.* 7*d.*). Of this 807,072 fr. (32,282*l.* 17*s.* 7*d.*) came from Great Britain.

Of unbleached goods the imported value was 170,937 fr. 44 c. (6,837*l.* 10*s.*), of which—

From—	Value.	
	Currency.	Sterling.
	Francs c.	£ s. d.
Belgium	113,577 48	4,543 2 0
Great Britain	44,275 20	1,771 0 2

The import of bleached goods was 51,779 fr. 10 c. (2,071*l.* 3*s.* 3*d.*), of which—

From—	Value.	
	Currency.	Sterling.
	Francs c.	£ s. d.
Great Britain	22,025 78	881 0 8
Holland	17,809 50	712 7 7
Belgium	6,481 7	259 4 10

The total of printed goods amounted to 521,702 fr. 40 c. (20,868*l.* 1*s.* 11*d.*), of which—

From—	Value.	
	Currency.	Sterling.
	Francs c.	£ s. d.
Great Britain	345,628 18	13,825 2 7
Holland	125,633 63	5,025 6 11
Belgium	41,027 68	1,641 2 2

Of a total importation of cotton handkerchiefs amounting to 21,180 fr. 7 c. (847*l.* 4*s.* 1*d.*), 20,030 fr. 7 c. (801*l.* 4*s.* 1*d.*) was British.

In dyed goods the imports reached 575,285 fr. 19 c. (23,011*l.* 8*s.* 2*d.*), of which—

From—	Value.	
	Currency.	Sterling.
	Francs c.	£ s. d.
Great Britain	312,771 11	12,510 16 11
Belgium	128,244 33	5,129 15 5
Holland	116,804 95	4,672 3 11

The total importation of sundry other cotton goods was 101,507 fr. 75 c. (4,060*l.* 6*s.* 2*d.*), of which—

From—	Value.	
	Currency.	Sterling.
	Francs c.	£ s. d.
Great Britain	62,341 66	2,493 13 4
Belgium	29,582 55	1,188 6 1

Woollen Tissues.

The value of the woollen goods imported was 106,974 fr. 47 c. (4,278*l.* 19*s.* 7*d.*), under the following heads:—

Woollen
goods.

Description.	Value.	
	Currency.	Sterling.
	Francs c.	£ s. d.
Unbleached	3,779 28	151 3 5
Bleached	1,835 67	73 8 7
Printed	4,049 40	161 19 6
Dyed	15,133 33	605 6 8
Cloth	1,167 7	46 13 8
Sundry (not specified)	81,009 72	3,240 7 9

(1828)

B 4

The unbleached goods were all Belgian exports.

Description.	From—	Value.			
		Currency.		Sterling.	
		Francs	c.	£	s. d.
Of the bleached goods..	Holland	1,560	0	62	8 0
Of the prints	British*	3,218	92	128	15 2
Of the dyed goods ..	Great Britain ..	8,693	56	347	14 10
	Holland	4,891	0	195	11 9
	Belgium	1,339	77	53	11 10
Of the sundry other goods	Great Britain ..	41,762	40	1,670	9 11
	Belgium	37,454	32	1,498	3 5

* The rest Belgian.

Carpets.

Carpets.

The total value of carpets imported was 15,041 fr. 8 c (601*l.* 12*s.* 10*d.*), of which—

From—	Value.			
	Currency.		Sterling.	
	Francs	c.	£	s. d.
Great Britain	7,545	74	301	16 7
Holland	4,384	25	175	7 5

Glassware and Glass Beads.

Glassware and beads.

The imports of glassware amounted altogether to 23,851 fr. 10 c. (954*l.* 0*s.* 11*d.*), and those of glass beads to 93,227 fr. 26 c. (3,729*l.* 1*s.* 10*d.*).

Of the former, Germany was the chief importing country, with 13,536 fr. 69 c. (541*l.* 9*s.* 4*d.*), Great Britain coming next with 3,244 fr. 93 c. (129*l.* 15*s.* 11*d.*), followed by Belgium with 3,150 fr. 47 c. (126*l.* 0*s.* 4*d.*), and Holland with 2,910 fr. 58 c. (116*l.* 8*s.* 6*d.*).

Of glass beads, the largest value imported, 36,264 fr. 88 c. (1,450*l.* 11*s.* 11*d.*), came from Italy; 23,712 fr. 28 c. (948*l.* 9*s.* 10*d.*) worth came from Great Britain; 10,670 fr. 20 c. (426*l.* 16*s.* 2*d.*) from Austria, and 7,305 fr. 70 c. (292*l.* 4*s.* 7*d.*) from Holland.

Imports for the first Half Year of 1893.

Value of imports during first 6 months of 1893.

The total value of goods imported into the Congo State from January to June of 1893 was 5,461,793 fr. 15 c. (218,471*l.* 14*s.* 6*d.*).

as compared with 4,721,509 fr. 68 c. (188,860*l.* 7*s.* 9*d.*) during the last 6 months of 1892.

The value of goods imported for immediate consumption during the same periods was 4,930,664 fr. 76 c. (197,226*l.* 11*s.* 10*d.*) in 1893, as against 4,059,636 fr. 63 c. (162,385*l.* 9*s.* 4*d.*) in 1892.

The following comparative statements show the values of the principal imports during the first half-year of 1893, and the last half of 1892, under their respective headings:—

Comparison
of imports
during first
6 months of
1893, and last
6 months of
1892.

Articles.		Value.			
		Currency.		Sterling.	
		Francs c.		£	s. d.
1. Arms, ammunition, and accoutrements ...	1st half of 1893 ...	380,037	3	15,201	9 7
	2nd half of 1892 ...	391,606	60	15,664	5 3
2. Boats, engines, tackle, and parts of boats	1st half of 1893 ...	54,323	41	2,173	2 9
	2nd half of 1892 ...	275,002	8	11,000	1 8
3. Alcoholic liquors	1st half of 1893 ...	513,233	45	20,531	6 9
	2nd half of 1892 ...	496,259	15	19,450	7 4
4. Provisions and foodstuffs	1st half of 1893 ...	788,650	6	31,546	0 1
	2nd half of 1892 ...	729,697	33	29,183	17 10
5. Pottery and earthenware	1st half of 1893 ...	47,390	38	1,895	12 4
	2nd half of 1892 ...	39,269	65	1,570	16 9
6. Clothes and linen	1st half of 1893 ...	135,053	49	5,402	2 9
	2nd half of 1892 ...	157,233	73	6,291	7 0
7. Machinery, tools, and metallic buildings	1st half of 1893 ...	662,556	13	22,502	4 6
	2nd half of 1892 ...	244,974	12	9,793	19 3

The latter total is sub-divided as follows:—

Articles.		Value.			
		Currency.		Sterling.	
		Francs c.		£	s. d.
Locomotives	1893	123,172	80	4,926	17 10
	1892	...	...	...	...
Railway rolling stock	1893	93,707	53	3,748	6 0
	1892	118,037	80	4,721	10 3
Sundry machines	1893	22,955	0	918	4 0
	1892	19,293	74	771	15 0
Supplementary and reserve parts of machines	1893	97,330	66	3,893	4 6
	1892	20,885	38	835	8 3
Sundry tools	1893	46,976	63	1,879	1 4
	1892	28,366	87	1,134	13 6
Telegraph and telephone materials ...	1893	3,499	72	139	19 10
	1892	1,783	29	71	10 7
Sundry metallic structures	1893	174,913	74	6,996	11 0
	1892	56,602	04	2,264	1 8

Articles.		Value.			
		Currency.		Sterling.	
		Francs c.		£	s. d.
8. Building materials	1st half of 1893 ...	158,018	89	6,320	15 2
	2nd half of 1892 ...	127,617	56	5,104	14 0
9. Metals	1st half of 1893 ...	607,432	97	24,297	6 4
	2nd half of 1892 ...	255,400	75	10,216	0 7

The principal items under the head of metals were :—

Articles.		Value.	
		Currency.	Sterling.
		Francs c.	£ s. d.
Steel rails	1893	167,617 87	6,700 14 4
	1892	49,130 0	1,965 4 0
Other steel goods...	1893	66,665 13	2,266 12 1
	1892	14,901 62	596 1 4
Copper wire	1893	107,447 95	4,297 18 4
	1892	81,531 78	3,261 5 5
Sundry iron goods	1893	162,611 83	6,504 9 5
	1892	73,882 79	2,955 6 3

Under the head of cutlery and ironmongery the imports were :—

Articles.		Value.	
		Currency.	Sterling.
		Francs c.	£ s. d.
10. Cutlery and ironmongery... ..	1st half of 1893	134,725 96	5,389 0 9
	2nd half of 1892	119,662 79	4,786 6 3

The importation of cotton goods was :—

Articles.		Value.	
		Currency.	Sterling.
		Francs c.	£ s. d.
11. Cotton goods... ..	1st 6 months of 1893	1,346,045 64	53,841 16 5
	2nd 6 months of 1892	1,217,031 44	48,681 5 2

Under the head of cotton goods the separate items were :—

Description.	Value.			
	1st Half-year, 1893.		2nd Half-year, 1892.	
	Currency.	Sterling.	Currency.	Sterling.
	Francs c.	£ s. d.	Francs c.	£ s. d.
Unbleached	128,124 0	5,124 19 2	153,109 6	6,124 7 3
Bleached	35,920 99	1,436 16 9	87,468 50	1,498 14 9
Printed goods	498,738 87	19,749 6 9	467,147 12	18,285 17 8
Handkerchiefs	9,047 60	361 18 0	20,030 7	801 4 2
Dyed goods	616,363 89	24,654 10 9	473,648 60	18,945 18 10
Sundries not specified	62,856 29	2,514 5 0	75,628 9	3,025 2 6

Woollen Goods.

				Value.		
				Currency.		Sterling.
				Francs	c.	£ s. d.
12 {	1st half of 1893 ..	..	..	106,986	48	4,279 9 2
	2nd half of 1892 ..	..	..	87,596	92	3,503 17 6

Carpets.

				Value.		
				Currency.		Sterling.
				Francs	c.	£ s. d.
13 {	1st half of 1893 ..	..	..	27,927	1	1,117 1 7
	2nd half of 1892 ..	..	..	11,915	80	476 12 8

Glassware.

				Value.		
				Currency.		Sterling.
				Francs	c.	£ s. d.
14 {	1st half of 1893 ..	..	..	14,103	82	564 3 1
	2nd half of 1892 ..	..	..	21,215	32	848 12 3

Glass Beads.

				Value.		
				Currency.		Sterling.
				Francs	c.	£ s. d.
15 {	1st half of 1893 ..	..	..	113,903	99	4,556 3 2
	2nd half of 1892 ..	..	..	82,875	78	3,315 0 7

With regard to the imports for the first 6 months of 1893, no particulars are given of their respective countries of origin in the official table from which the above statement has been compiled.

Shipping Statistics of the Independent State of the Congo for the Year 1892 and the First Six Months of 1893.

The number of vessels which entered the port of Banana during the first 6 months of 1892 was —

Shipping statistics of ports of Banana and Boma. Port of Banana entries.

	Number of Vessels.	Tons.
Sea-going vessels	39	45,285
Coasting „	169	4,688

During the second half-year the number of vessels which entered the same port were—

	Number of Vessels.	Tons.
Sea-going vessels	38	40,116
Coasting „	178	4,849

making a total for the year of—

	Number of Vessels.	Tons.
Sea-going vessels	77	85,401
Coasting „	347	9,537

The respective nationalities of the sea-going vessels entered were :—

Nationality.	Number of Vessels.	Tons.
British	33	42,144
German	14	15,583
Dutch	15	13,231
French	7	11,350
Belgian	7	2,688
Norwegian	1	405

During the first half-year of 1893 the entries into the port of Banana were :—

	Number of Vessels.	Tons.
Sea-going vessels	41	46,088
Coasting „	105	3,116

Of the sea-going vessels there were—

Nationality.	Number of Vessels.	Tons.
British	20	25,285
German	12	12,227
Dutch	8	8,141
Norwegian	1	435

The numbers of vessels which cleared from Banana during the Clearances. first 6 months of 1892 were respectively:—

	Number of Vessels.	Tons.
Sea-going vessels	44	49,906
Coasting „	201	5,822

and during the second 6 months—

	Number of Vessels.	Tons.
Sea-going vessels	42	44,484
Coasting „	185	4,909

making a total for the year of—

	Number of Vessels.	Tons.
Sea-going vessels	86	94,390
Coasting „	386	10,731

The respective nationalities of the sea-going vessels which cleared from Banana were:—

Nationality.	Number of Vessels.	Tons.
British	35	44,736
German	19	21,212
Dutch	15	13,231
French	7	11,350
Belgian	9	3,456
Norwegian	1	405

During the first 6 months of 1893 there cleared from Banana—

	Number of Vessels.	Tons.
Sea-going vessels	44	50,844
Coasting „	104	3,019

Of the sea-going vessels were—

Nationality.	Number of Vessels.	Tons.
British	21	27,124
German	14	14,456
Dutch	9	9,264

Port of Boma entrances. During the first half-year of 1892 there entered the port of Boma—

	Number of Vessels.	Tons.
Sea-going vessels	42	44,358
Coasting „	125	8,855

During the second half-year the entries consisted of—

	Number of Vessels.	Tons.
Sea-going vessels	37	43,805
Coasting „	147	7,341

making a total for the year of—

	Number of Vessels.	Tons.
Sea-going vessels	79	88,163
Coasting „	272	16,196

Of the sea-going ships entered—

Nationality.					Number of Vessels.	Tons.
British	..	..	..	..	41	54,421
German	..	..	..	..	19	22,279
Dutch	..	..	..	..	5	4,772
Belgian	..	..	..	..	13	4,992
French	..	..	..	..	1	1,699

For the first 6 months of 1893 the entries into the port of Boma consisted of—

					Number of Vessels.	Tons.
Sea-going vessels	..	..	..	..	46	57,536
Coasting	„	..	..	..	131	3,532

Of the sea-going vessels there were—

Nationality.					Number of Vessels.	Tons.
British	..	..	..	..	26	34,590
German	..	..	..	..	16	19,016
Dutch	..	..	..	..	4	3,930

During the first half-year of 1892 there cleared from Banana— Clearances.

					Number of Vessels.	Tons.
Sea-going vessels	..	..	..	..	43	45,860
Coasting	„	..	..	..	129	8,668

The corresponding numbers for the second half-year were respectively:—

					Number of Vessels.	Tons.
Sea-going vessels	..	..	..	..	36	42,890
Coasting	„	..	..	..	147	7,358

The total for the whole year was consequently :—

	Number of Vessels.	Tons.
Sea-going vessels	79	88,750
Coasting „	276	16,026

The distribution of the sea-going vessels and tonnage cleared, according to nationalities, was :—

Nationality.	Number of Vessels.	Tons.
British	40	53,506
German	20	23,781
Belgian	13	4,992
Dutch	5	4,772
French	1	1,699

The vessels which cleared from Boma during the first half-year of 1893 were :—

	Number of Vessels.	Tons.
Sea-going vessels	45	56,694
Coasting „	135	3,597

Of the sea-going ships—

Nationality.	Number of Vessels.	Tons.
British	26	34,590
German	16	19,016
Dutch	3	3,088

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AND FINANCE.

ARGENTINE REPUBLIC.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF THE ARGENTINE REPUBLIC.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1178.

*Presented to both Houses of Parliament by Command of Her Majesty,
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1310. Salonica	2½d.	1370. Genoa	3½d.
1311. Valparaiso	2d.	1371. Batoum	2d.
1312. Mozambique	1d.	1372. Rouen	2½d.
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ARGENTINE REPUBLIC.

BUENOS AYRES.

The Hon. F. Pakenham to the Earl of Kimberley.

My Lord, *Buenos Ayres, April 6, 1894.*
I HAVE the honour to transmit herewith a Memorandum on the Argentine Trade Returns for 1893, which has been drawn up by Mr. Findlay, Second Secretary in this Legation.
I have, &c.
(Signed) F. PAKENHAM.

Memorandum on the Argentine Trade Returns for the Year 1893.

ABSTRACT of Contents.

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General
remarks.

The returns of Argentine trade for the year 1893, which have lately been published by the National Statistical Department, show the following results as compared with the preceding year:—

IMPORTS.				
			Value.	
			1892.	1893.
			Dollars gold.	Dollars gold.
Subject to duty ..	..	..	77,089,633	83,509,102
Free ..	..	..	14,391,530	12,596,257
Bullion ..	..	..	6,520,348	4,683,638
Total ..			98,001,511	100,793,997
Or about ..			£ 19,600,302	20,153,799

EXPORTS.				
			Value.	
			1892.	1893.
			Dollars gold.	Dollars gold.
Subject to duty ..	..	..	73,916,994	49,071,250
Free ..	..	..	38,892,238	43,632,584
Bullion ..	..	..	1,979,711	815,585
Total ..			114,788,943	93,519,419
Or about ..			£ 22,957,788	19,703,883

Duties of all categories (including “additional”) were collected during the year to the amount of 30,719,797 dol. gold, and 4,732,577 dol. paper.

Total trade. The total volume of trade in 1893, as compared with 1892, is shown approximately as follows:—

TABLE showing Total Trade during the Year 1893 compared with 1892.

			Amount.	
			1892.	1893.
			£	£
Imports ..	..	..	19,602,302	20,153,799
Exports ..	..	..	22,957,788	19,703,883
Total ..			42,560,090	39,862,682

From these figures it appears that there has been a decrease in the total volume of trade of over 2,500,000*l.* sterling in 1893, as compared with the preceding year. The imports have increased, but the exports have fallen off to a greater extent. The following details concerning the principal articles of import and export bring this more clearly into relief:—

IMPORTS.

Articles.	Amount.	
	1892.	1893.
	Dollars gold.	Dollars gold.
Olive oil	1,969,293	955,890
Refined sugar	3,481,572	1,876,880
Common wine in casks	3,650,579	5,298,610
Wood, chiefly pine.. .. .	3,712,206	4,889,389
Iron machinery	10,339,250	13,055,393
Woven and spun goods, including sackcloth.. .. .	30,617,216	27,813,710
Railway materials	2,953,152	2,888,579
Coal and fuel	6,095,642	6,868,086

EXPORTS.

Articles.	Quantity.	
	1892.	1893.
	Tons.	Tons.
Wool	154,600	123,200
Sheepskins	30,000	25,500
Wheat	470,100	1,008,100
Maize	445,900	84,500
Linseed	42,900	72,200
Hay (alf-alfa)	39,200	53,500

These figures show a great decrease in the exportation of *Fluctuations.* wool, sheepskins, and maize. The quantity of wheat, hay, and linseed exported has increased, but the fall in the values of wheat and wool has been a heavy blow to agriculturists and stock-farmers. In 1892 wool was valued at about 285 *dol.* gold per ton, and in 1893 it fetched but 203 *dol.* gold.

In 1892 wheat was sold at 8 *dol.* per 100 kilos. Now it barely fetches 6 *dol.*, and the margin of profit is necessarily much smaller.

The following comparative table shows in round numbers the *Imports.* value of imports in 1892 and 1893 (exclusive of bullion) distributed according to their origin:—

IMPORTS.

From.	Amount.	
	1892.	1893.
	Dollars gold.	Dollars gold.
United Kingdom	35,800,000	32,500,000
France	10,400,000	12,100,000
Germany.. ..	10,600,000	11,000,000
Italy	8,400,000	9,300,000
United States	7,400,000	9,610,000
Belgium	6,700,000	9,635,000
Various	12,100,000	11,955,000
Total	91,400,000	96,100,000

Comparisons. The United Kingdom still holds its place at the head of the list. But while other countries have improved their position, the volume of the import trade with the United Kingdom has decreased to the extent of 3,000,000 dol. gold. France again takes the second place from Germany, and the United States have improved on the great advance made by their import trade in 1892. The number of American agricultural machines imported during the last wheat harvest was enormous, and may be attributed not only to the cheapness of the machines, but to the enterprise of the manufacturers in sending trained machinists to look after them when at work. The average "chacrero" (small farmer) is by no means a highly trained agriculturist, and it is absolutely necessary that there should be someone capable of showing him how to use his "reapers and binders," &c., otherwise they soon become unserviceable from rough treatment.

Commercial travellers. During a trip through the wheat districts in Entre Rios last December I constantly found American travellers superintending the working of their machines, and they seemed to have their hands full. I never met a single traveller for any British firm, and I cannot help thinking that by a little more enterprise British manufacturers might obtain a larger share in the trade of cheap agricultural machinery which threatens to become a monopoly of the United States. The British manufacturers appear to hold their own as regards the heavier and more expensive machinery, such as thrashing machines, &c.

Exports. The following table shows the value of exports from the Argentine Republic (exclusive of bullion) in the years 1892 and 1893, according to their destination :—

EXPORTS.

From.	Amount.	
	1892.	1893.
	Dollars gold.	Dollars gold.
United Kingdom	19,700,000	18,531,000
France	26,400,000	18,323,000
Brazil	10,500,000	12,038,000
Belgium	14,700,000	10,939,000
Germany.. ..	16,600,000	10,452,000
Italy	4,800,000	3,390,000
United States	4,800,000	3,416,000
Various	15,700,000	15,614,000
Total	112,700,000	92,703,000

The United Kingdom again heads the list; the export trade Comparisons. to all the principal countries has declined, with the sole exception of that to Brazil. As has been pointed out above, this decline is attributable not only to a decrease in the quantity of several of the chief articles of export, but also to the heavy fall in their market value.

With regard to the low prices prevalent in the wheat market, Wheat. it is evident that, if they continue, many countries now exporting wheat will be unable to do so at a profit.

From figures lately published it appears that Kansas and other parts of the United States will be unable to continue the struggle at present prices.

It is, therefore, interesting to know whether the Argentine wheat grower can continue to hold his own, and, with this object, I have endeavoured to obtain reliable figures as to the cost of production.

The following information has been supplied to me through the kindness of one of the best authorities on the subject of the wheat industry in the River Plate, Mr. T. H. Sams.

This gentleman says in his letter on the subject:—

“I give you what I consider a fair average, from information from different districts, but while giving you this, I wish to point out some of the reasons which make it difficult to arrive at anything nearer than an approximate average.

“Rent varies considerably from 2 dol. 50 c. to 20 dol., according Rent. to quality of land, distance from railway and from port of shipment. Then the relative positions of owners of chacras (agricultural farms) and tenants of chacras are very different. The tenant must pay his rent. The owner has, perhaps, invested his capital when land was much cheaper than it now is; and although, strictly speaking, he should debit himself with a rent equivalent to what the land could be rented for, he may consider himself entitled to debit himself only with a fair interest on the capital

actually invested, and thus could produce at less cost than the new comer who has to pay a high rent.

Labour "Here again there are wide differences, many 'chacreros' (farmers) have families sufficiently large to enable them to save a considerable sum in wages.

"Then the rate of hired labour varies a good deal. This year, in Santa Fé, from 110 dol. to 150 dol. per month, with keep, has been paid. Last year wages were higher in some districts in the south-west than this year.

"Now, as wages and cost of keep of hired men is a principal item of expenditure, you will see that the cost of production may vary considerably under this head.

Machinery. "The depreciation generally forms a considerable item, though probably few farmers make anything like a just depreciation. Those who are most careless would be the last to believe that they should debit themselves with from 20 per cent. to 25 per cent. under this head, on certain of their farm implements, for annual depreciation.

Quality. "Quality has naturally an influence on the relative return to the producer.

Delivery. "Although losses through delays in delivery do not, strictly speaking, belong to the cost of production, yet these losses amount to the same thing to the producer, for it is generally his loss, and his profit is thereby lessened.

"This year there are tons of wheat waiting for wagons at the stations, and the loss by sprouting and rotting must be great. I may say that I find the reduced cost of 'Binder' twine, of seed, of harvesting machinery, and of thrashing, has to some extent counter-balanced the generally higher cost of labour and rent, while the additional yield has correspondingly lessened the cost of production per 'fanega' (100 kilos.).

"I consider the following a fairly approximate average:—

Harvest—	Per Fanega (100 Kilos.).	
	Average Cost of Production.	Price Obtainable at nearest Station.
	Dol. c.	Dol. c.
1892-93	4 70	6 50
1893-94	4 20	4 70

Thus, according to Mr. Sams, the average profit on 100 kilos. is only 50 c. (or 5 dol. per ton) for 1893-94, compared with 1 dol. 80 c. per 100 kilos (18 dol. per ton) in 1892-93.

An "old colonist" in Esperanza, Santa Fé, whose calculations have been published in the Buenos Ayres "Standard," gives the following estimate of his expenses and the average return:—

Capital—First Year.

Farm of 100 hectares, 75 of which are cultivated. The wife looks after house; husband, son, and "peon" look after land.

Description.	Amount.
	Dollars paper.
Payment of 20 per cent. on cost of land, at the rate of 50 dol. m/n per acre	1,000
Hut.. .. .	250
3 ploughs	82
6 harrows	72
1 cart	250
11 header	1,100
2 harvesting cart, &c.	120
1 bullocks.. .. .	480
6 horses	180
5 milch cows	150
3 pigs, fowl, &c.	150
Total	3,834

Expenses.

Description.	Amount
	Dollars paper.
Family expenses and peon, 40 dol.	480
70 hectares wheat seeding at rate of 60 kilos. (6 dol. per 100 kilos.)	252
5 hectares maize seeding	15
8 per cent. interest on land debt	320
10 per cent. wipe out for wear and tear	283
Threshing average crop	700
A good peon 20 dol. per month	240
2 labourers for 15 days' harvesting at 3 dol. m/n	90
Total	2,480

Returns.

Description.	Amount.
	Dollars paper.
70,000 kilos., average wheat crop, say 1,000 kilos. per hectare, at 6 dol. m/n per 100 kilos.	4,200
3 calves	18
fat pigs at 30 dol.	90
30 fanegas of maize at 5 dol. m/n	150
Dairy products	150
Total	4,608

"Old Colonist" thus calculates that with an average crop the farmer gets a net return of 2,128 dol. m/n., of which 1,333 dol. goes to the owner of the land to pay the second instalment. In 2 years he is owner of the land—100 hectares. Once owner of the land his position stands as follows:—

Description.	Amount.
	Dollars m/n.
Capital	7,834
Expenses of year	2,160
Returns of average crop	4,608
Clear profit	2,448

Say 30 per cent. for his capital, calculating an average crop and present low prices.

The calculations of the Esperanza colonist gives a cost of 13.40 dol. per acre and a return of 22½ dol., but no allowance is made for wheat tax, land tax, cart tax, railway freight, for the 6 dol. per 100 kilos. must be for wheat placed in port or on board. At all events it may be inferred with good arguments that it pays the Santa Fé colonist at Esperanza to grow wheat at present prices, much more so if he happens to be owner of his farm, which is generally the case.

Another estimate, contributed by a correspondent of the same paper, puts the net profit on wheat grown about 100 miles from the River Plate at only 2.40 dol. paper per acre at present prices. It clearly would not pay to grow wheat for such a scanty return.

Owing to the difference in the conditions of productions in different districts it is difficult to strike a general average of the profit obtained by wheat growers, but it appears certain that, in the best districts at any rate, a remunerative return can still be obtained.

I am informed that the wheat-growers in the colonies of the Curumalan Company, in the south of the province of Buenos Ayres, have been able to pay off a large part of the advances made to them in former years, that they are rapidly becoming owners of the land they cultivate, and are offering higher rents for camp suitable for agriculture. This conclusively proves that they are doing well, but it should be remembered that they have had an exceptional crop.

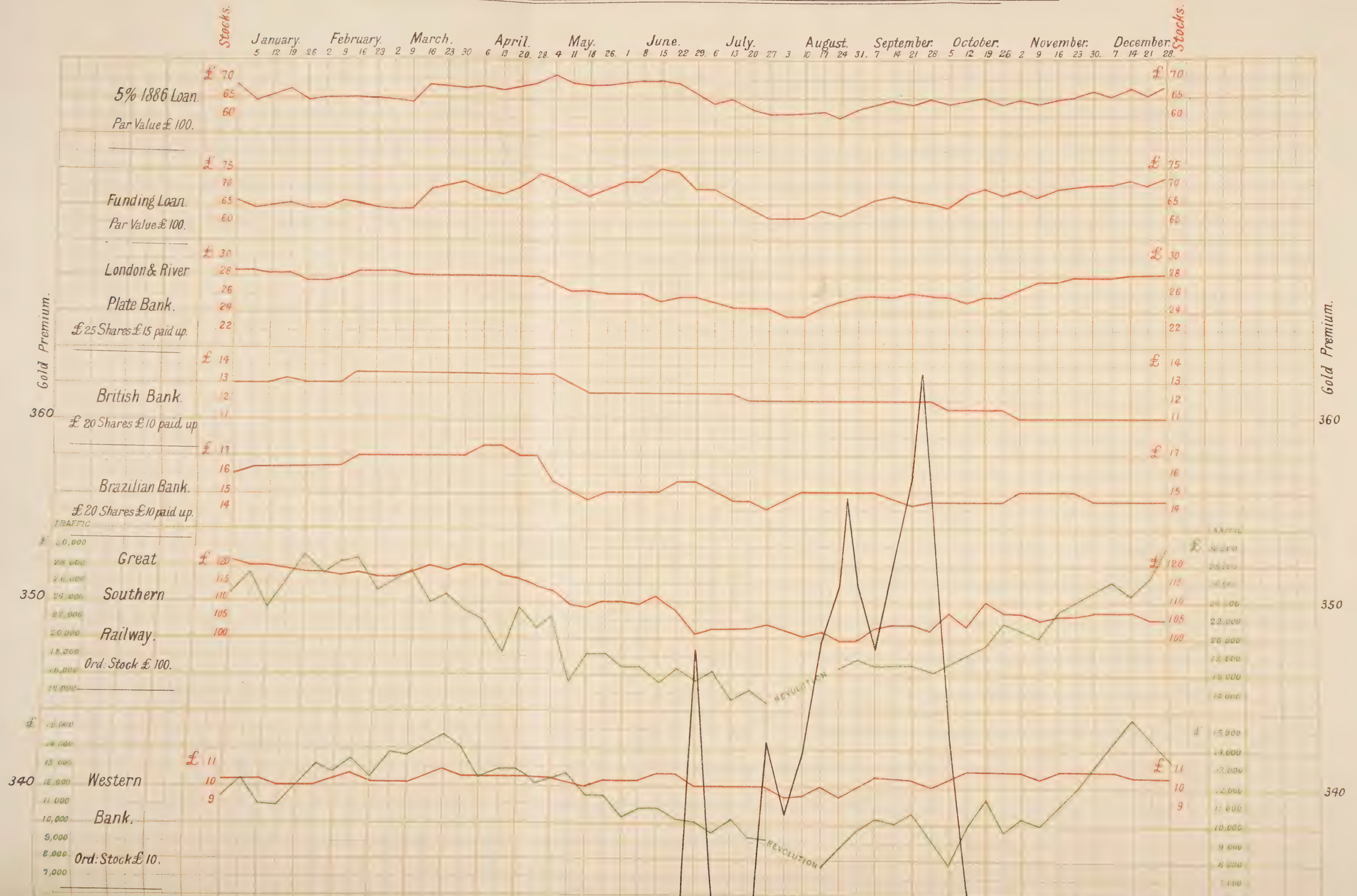
In any case wool will continue to pay better than wheat, except in the neighbourhood of railways or other means of transport, owing to its being more valuable in proportion to its weight.

Farmers'
difficulties.

It should also be borne in mind that the gold-premium has a considerable effect upon the wheat industry.

The price of wheat is of course regulated by the foreign

SUPPLEMENT TO THE REVIEW OF THE RIVER PLATE.





STOCKS Red.
TRAFFIC Green.
GOLD PREM: Black.

The above table shows the fluctuations in the Stocks and Shares published by "The Review of the River Plate" in their special London Cablegrams, the fluctuations in the Traffic receipts of the various Railway Companies whose Stocks are quoted and the Gold premium during the year 1893.

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market, and consequently the wheat-growers and stock-farmers sell their produce for gold or its equivalent.

Their machinery, and practically their land, have to be paid for in gold, but their living expenses and hire of labourers, if any are employed, are paid in depreciated paper, and a sudden fall in the gold-premium would hit the farmer pretty hard, for a time at least. It is probable, however, that the effect would be temporary, and that the agriculturist would ultimately profit by the increased confidence, and consequent revival of prosperity, which alone can cause any serious fall in the present premium on gold.

A table showing the fluctuations in the principal Argentine stocks and shares, in the traffic receipts of the various railways, and also in the premium on gold during the past year, is annexed to this memorandum.

This table, which was published as a supplement to the "Review of the River Plate," contains a mass of information in a simple and intelligible form.

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AND FINANCE.

AUSTRIA-HUNGARY.

REPORT FOR THE YEAR 1893

ON THE

TRADE, &c., OF TRIESTE.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1292.

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TRIESTE.

Consul Haggard to the Earl of Kimberley.

My Lord, *Trieste, April 29, 1894.*

I HAVE the honour to forward my Commercial Report for the year 1893.

I regret that it contains but few statistics, or matter formed upon statistical information, which is published here too late in the year to be made use of before the third quarter.

I have, &c.

(Signed) JOHN G. HAGGARD.

Report on the Trade and Commerce of Trieste for the Year 1893.

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Trade and Commerce.

During the year 1893 commerce through Trieste slightly increased. It is impossible yet to show this by the statistics, as the official publications are very tardily issued; but, judging from a variety of circumstances, there seems little doubt upon the point.

To the abolition of the free port is placed the great recent depression, and it may have done harm to Trieste, but other circumstances (more or less touched on in this report), perhaps growing out of that undertaking, have largely aided towards the injury of trade here during the last year or two.

Probably the chief of these has been the unusual competition of Fiume. When the free port at Trieste was abolished large warehouses and stores had to be erected to contain bonded goods. To defray the cost of the construction rent in these was placed at a very high figure.

Upon this Fiume, backed by the Hungarian Government, at once reduced its warehouse rents to an almost nominal rate, which, consequently, greatly injured Trieste by the resulting transference to Fiume of trade both by sea and by land.

Fiume a few years ago was almost unknown, but now year by year it is making itself more and more important, being greatly assisted by its Government in every direction to the disadvantage of Trieste. It is, however, to be hoped that some assimilation may be immediately arrived at in the arrangements and charges of the two ports.

It is well known that certain branches of commerce, such as timber, oak staves, corn, flour, prunes, and spirits for export, and wine for transport to the interior, that formerly passed exclusively through Trieste, have been largely transferred to Fiume; and, consequently, vessels arriving here have a difficulty in obtaining freight unless they proceed to Fiume.

Railway freight to Trieste, as compared with that obtaining to Fiume, is also much, and apparently justly, complained of by Trieste merchants.

The new Minister for Commerce arrived at Trieste on January 20, 1894, to personally investigate the commercial condition of the town, and especially the question of warehouses (Magazzini Generali).

About a month later the Government proposed an arrangement by which it takes over the warehouses, which, since the abolition of the free port, have been in the hands of the municipality and of the local Chamber of Commerce.

The responsibility for the amount of 11,000,000 fl., originally borrowed for the construction of the warehouses, will be accepted by the State.

The coal trade through Trieste slightly increased in 1893, and Coal trade.
(1718)

as respecting English coal, the importation of Welsh increased, whilst that from the north country diminished.

The following schedule gives the total imports for 1893, with the market prices, at the commencement of 1894:—

Whence Imported—	Prices in February, 1894.			Amount.
	£	s.	d.	Tons.
Foreign—				
Cardiff	1	0	0	64,066
Newcastle	0	16	6	19,528
Scotch	0	16	6	11,199
Hull	0	16	9	1,532
Home produce—				
Istria	0	19	0	30,633
Dalmatia.. .. .	0	15	0	12,999
Styria	0	15	0	15,430
Moravia	1	2	0	287

Thus the total amount of coal imported was 155,674 tons, and the English coal exceeded the home-produced coal by 36,976 tons.

The Cardiff, Scotch, and Hull coal was imported only for the use of steamships, and that from Newcastle for the gas and foundry works. For this latter purpose also nearly 1,000 tons of coke was imported from Newcastle.

Of the home-produced coal that from Istria and Moravia was used for steamships, the Styrian coal (which is only lignite) for locomotives and small industries, and the Dalmatian coal, which is much impregnated with sulphur, for the small vessels that ply up and down the coast.

The Austrian Navy burns nothing but patent fuel, chiefly because it is so easily stowed. It all comes from Cardiff, and is made from Welsh coal. Persons desiring to compete in this product should address themselves to the Austrian Naval Attaché in London.

Of the Austrian coal that from Moravia and Istria is of excellent quality.

That from Moravia has, it is alleged, the same heating power as the best Welsh coal, but the railway freights are so high that very little finds its way to Trieste at present.

The Istrian coal is reported to be also most excellent, and to much resemble Yorkshire coal. It is difficult to understand why more of it is not mined.

The two mines now at work are fitted with antiquated machinery, which, of course, must increase the cost of production, but there also seems to be a desire to limit the output and only to work for a high rate of profit. The facilities for shipment are considerable, as vessels of 300 tons can pass up the Canale di Arsa and load close to the mines.

Both of the mines are now under one proprietor, but it is

possible that there may be competition before long, as the excellence of the coal is attracting attention. Only recently several Belgian mining engineers have been boring in Istria with the view of opening new mines.

As things are at present, however—in consequence of the high railway freights for Moravian coal, and high prices for Istrian coal—it is impossible for the native coal to compete with that from England. Even the late great coal strike did not affect prices here, as at the first warning of its coming on enormous supplies were laid in which lasted until the strike was over.

The possible development of coal mining in Istria may, before many years, have important bearing upon Mediterranean markets.

The coffee trade through Trieste was very favourable in 1893 Coffee.—a matter of some importance, for it is one of the principal branches of commerce at this port. It is said, however, that the profits made by the merchants would have been even larger but for the changes made in the Austrian currency, which seem to have affected them in some way.

The market was almost uniformly steady (towards increasing), the principal cause being the not very good crops, the small stock in hand in Europe, and the unusual conditions in the Brazils induced by the revolution there.

The only time that prices seemed to go down was in April last, the cause being ascribed to financial difficulties, which resulted in the bankruptcy of some great coffee firms in New York.

The largest quantities of coffee imported in 1893 came from Santos and Rio; but the high prices of Rio coffee, especially in the last months of the year, and the critical financial condition of Greece (one of the greatest consumers of the quality) greatly injured this trade.

The stock of coffee in Trieste in September last consisted of 100,290 quintals, of which 20,000 quintals were from Rio, and 7,800 quintals from Java. At the same time the stock in the United States was small, and what has seldom happened before, large demands came to Trieste from there for Brazilian coffee.

The markets reopened at the end of December with still higher prices, which probably will not fall at present.

The imports, exports, and stock in hand of coffee in 1893, as compared with 1892, were as follows:—

	Quantity.	
	1892.	1893.
	Quintals.	Quintals.
Imported	428,227	364,070
Exported	376,487	370,580
Stock in hand on December 31 ..	77,790	71,270

Recently in some of the Vienna papers a cry has been raised in favour of Fiume against alleged robbery of coffee from the bags at Trieste upon its arrival, especially of that from the West Indies, and it is said this dishonesty has been carried on to so great an extent as to absolutely injure the trade.

Apparently there is little truth in the allegation, as far as Trieste is concerned, but the cause of it can be easily traced.

Coffee from the West Indies for the Trieste market is transhipped several times at New York, London, and into and from endless lighters and cargo boats before it arrives at its destination. To begin with the bags are not very strong, and, naturally, before the end of the journey has been reached, the leakage of coffee has been very great. At Trieste (and it is said only at Trieste) the ships' holds are carefully swept on discharge, and all the escaped coffee is carefully collected for distribution in proportion amongst those who had coffee on board. But it is obvious that this cannot always reach the proper persons, and besides the sweepings of the hold of the last steamer may be a trifle to the whole amount of loss from the time the coffee was first sent afloat.

Copal.

Trade in copal through Trieste in 1893 has been considered unsatisfactory in comparison to former years immediately preceding; but the principal cause of the falling off is on the other hand eminently satisfactory, as it points to the gradual but evident settling down of the Soudan, and to the general increase of trade from that quarter.

Supplies from Kordofan and Khartoum were most abundant, and in consequence prices only averaged during the year 58 fl. per "fardo" of 150 kilos. each from the former place, and of 52 fl. or 50 fl. per "fardo" from the latter.

Such low prices put the Senegal gum out of the market altogether, though at the commencement of the year it was quoted at 47½ fl. From this it went down to 36 fl. and to 38½ fl.

The year 1894 opens with no chance of copal further falling, as prices are now what they were before the closing of the Soudan. Noting always that the stock in hand at that time in the various European markets was enormous, whilst now it is small.

During 1893 the following kinds and quantities of copal were imported into Trieste:—

Country.					Fardi.*
Soudan	..	..	..	..	2,746
Senegal and Niger..	..	..	..	..	553
Aden and India	..	..	..	..	1,423
Gheziri	..	..	..	..	723
Total	..	..	..	..	5,445

* 1 fardo = 150 kilogrammes.

TABLE showing the Gross Imports and Exports of Copal for the Year 1892 compared with 1893.

Stock in Hand—	1892.	1893.	Remarks.
	Fardi.	Fardi.	
At Trieste in January ..	1,309	1,525	
Imported	9,487	5,445	
Total	10,796	6,970	
Exported and manufactured	9,271	6,239	
At Trieste on December 31	1,525	731	

NOTE.—1 fardo = 150 kilogrammes.

In the early part of 1894 the market in Trieste for cotton seed oil was very quiet, prices in some cases being lower even than that of cost Cotton-seed oil.

The cause of this has been the low figure at which olive oil has been selling.

The stock in hand of cotton seed oil is small, and the tendency of the market is still to weaken.

An Austrian industry that possibly may soon compete with English interests is the Portland cement trade. Cement.

Some few years ago the importation of cement through Trieste was very large, most of it came from Newcastle but some from Dunquerque. This has entirely ceased, and it seems not unlikely that the exact reverse may take place through exportation of Austrian cement to England and France.

There are now many cement works in Austria which sprung into existence through the high prices of the English article. These manufactories are making cements of different degrees of strength, but quality for quality quite equal to English cement, at present it is sold here for about the same price as English cement in England, so there is no chance of the English trade being revived, for the latter has against it duty and cost of bringing the cement to this country.

It seems that all or nearly all the Austrian cement works have the custom of selling their speciality at the same price for delivery in any part of the Empire, that is to say, that a factory at Prague will sell cement (for instance) for delivery at Vienna or delivery at Trieste at the same price, bearing itself the extra expenses of forwarding. Under this system, which pays, shipping freights being so low, and return cargoes so much looked for by British ships, it only wants the demand for cement from England now to make export pay too.

It is alleged that the abolition of the free port at Trieste was the last blow to the British cement trade through this town.

Notwithstanding the recent severe competition of Fiume, the orange and lemon trade improved in amount through Trieste in 1893, but at the same time prices fell. Oranges and lemons.

It appears that buyers were attracted rather to the Fiume market than to that of Trieste through gigantic efforts on the part of the "Hungarian Commercial Society," who, it is alleged, issued circulars and notices in enormous quantities all over Austria and Hungary in praise of the advantages of buying at Fiume. The consequence was that there were few buyers at Trieste, with an abundant import.

The total import through Trieste for the season of 1892-93 was 960,622 cases, of which—

Came from—					Number of Cases.
Sicily—					
Catania	..	..	..	..	504,906
Messina	..	..	..	..	259,284
Syracuse	..	..	..	..	87,000
Palermo	..	..	..	..	12,571
Italy					
Puglia	..	..	..	..	50,298
Riviera di Sorrento	..	..	..	..	7,308
Riviera Ligure	..	..	..	..	4,380

Therefore the total import from Italy and Sicily was 925,747 cases, and from other countries 34,875 cases.

The amount was almost entirely introduced by sea, only 16 railway car loads arriving. It may be of some interest to specify the flags (under which the trade was carried on) of the 273 steamers and 84 sailing vessels employed.

Of the steamers were :—

Nationality.					Number of Vessels.
Italian	..	..	..	..	120
Hungarian	..	..	..	..	47
Austrian	..	..	..	..	45
English	..	..	..	..	35
Norwegian	..	..	..	..	26

All the sailing vessels were Italian.

Of all the oranges, the Sicilian fetch the highest prices, as they keep better.

It appears that only about 7,000 cases of Mandarin oranges arrived at Trieste in 1893.

The lemon market in 1893 was an exceedingly bad one, and purchasers could scarcely be found to buy at cost price.

The next crop of both oranges and lemons is expected to be extraordinarily good, and anxiety is felt as to how it can be disposed of.

Nearly all of this fruit is transported to the interior of Austria, Germany, and Russia, and is consumed there.

The citron trade through Trieste is of great interest, and of some importance. There are two kinds of fruit imported, each intended for very different purposes.

Citron trade
through
Trieste.

One is the large fruit used for preserving and crystallising, grown on grafted trees, and gathered from November to January, the other, called the "Citron for the Law," is the natural, unripe, and non-edible fruit gathered from ungrafted trees from June to August 15. The latter is solely used in the religious ceremonies of the Jews at the time of the Feast of Tabernacles, and from a commercial point of view it has been perhaps at times the most valuable branch of the citron trade through Trieste.

It is an enterprise of great antiquity. For centuries past it has been the custom for Jewish merchants from Poland, Russia, and Eastern Europe generally to collect at Trieste about the month of August in each year to await the arrival of the citrons. Until comparatively lately this port has been the sole centre for the distribution of the "Citrons for the Law." Political reasons and Jewish disabilities elsewhere probably originally caused it to be especially chosen for the market, but above all the dread of pirates in the Levant prevented the Jews from travelling further south to purchase at the places of production.

To give some account of the origin of the trade one must first refer to the Bible in Leviticus xxiii., v. 40, where are specified some of the ceremonies to be observed on the first day of the Feast of Tabernacles. In the English Authorised Version the translation appears to be incorrect, and no mention of any "fruit" to be used at the Feast is made either in Leviticus or the parallel passage in Nehemiah viii., v. 15. This, however, is corrected in the Revised Version as far as Leviticus is concerned, where the words "fruit of goodly trees" appear, without specifying, however, what kind of fruit should be employed. The Hebrew Version as commonly used is equally inexplicit, but singularly enough in the Italian Version "the fruit of citron trees" is mentioned as the special kind to be used at the Feast. I am not aware from what authority this translation was obtained, but it is remarkable that the Italian Bible should mention by name the fruit used for ages by the Jews, who themselves attribute the selection of that of the ungrafted citron tree simply from its resemblance in shape to the human heart, and from its fine odour.

I here quote the parallel readings:—

It has ever been held that the fruit must be as unblemished as possible, prices varying enormously in proportion to the entire perfection of the specimens. I have been credibly informed that a single fruit has fetched of late years as much as 3*l.* 10*s.* Even in 1893 some were sold for as much as 1*l.* each.

It is absolutely necessary that the calyx should be present and uninjured, and for this reason (because at the time of the Feast the fruit is not mature) the unripe fruit is gathered. The importance of this point lies in the fact that the presence of the calyx is supposed to denote extreme freshness, implying the fiction that the buyer (perhaps in Poland) has himself plucked the citron from its branch in the Holy Land.

It is said that through Jews becoming gradually less orthodox in the East of Europe the demand for "Citrons for the Law" is likely to decline, but facts point to no such probability at present, on the contrary it would pay to plant further, as prices are even now so high; and the attention of British enterprise, in Cyprus especially, is called to this, bearing in mind always that the Jewish requirements must be most strictly complied with to make such an undertaking successful.

The Jewish merchants arriving here from the East of Europe to purchase the citrons are often men of considerable wealth, but their appearance belies it. Although large numbers of them may have collected in Trieste, they are only seen about the streets occasionally in ones and twos. The object of this self effacement is to convey the impression that there are very few of them in the town competing, and so prevent a rise in prices.

Although the only dialect they are acquainted with as a rule is Yiddish, their reputation for success and sharpness is remarkable, but as the trade is almost entirely in the hands of the Jews, there is not much Christian complaint against them.

The "Citrons for the Law" ("Cedri della Legge"), that is, the immature fruit of the ungrafted tree, are chiefly grown in the Ionian Islands, Parga, Jaffa, and the Holy Land.

There is no prejudice nowadays in favour of those from the Holy Land, although it appears to have once existed.

Until lately the fruit most in demand has been that exported from Corfu, in consequence of its superiority in growth. But two circumstances have tended to check the Greek's practical monopoly, first, in consequence of combination, the high prices they asked; and, second, the riots against the Jews at Corfu in February, 1891, for which the Polish and Russian Rabbis have retaliated by boycotting citrons from that quarter, pronouncing an anathema against all fruit from the Ionian Islands.

From the customary restrictions imposed by the Rabbis upon the trade as given below, this measure has had most weighty consequences; they have avenged the wrongs of their race, and will eventually lower prices by one and the same manœuvre.

All fruit for use at the Feast of Tabernacles, no matter whence shipped, must bear inside each case a certificate of origin signed by the Rabbi at the port of shipment. This will show with what ease the Jews can entirely control the citron trade from any quarter.

In consequence of the temporary suppression of this Ionian Islands trade in "Citrons for the Law" (except with forged Rabbi's certificates), the cultivation of the tree is already commencing elsewhere, notably amongst the agricultural Jews colonies recently settled in the Holy Land upon emigration from Russia, and Russian and Polish Jew merchants are for the first time now beginning to travel to these places of production to purchase off the trees. Doubtless they would do the same to Cyprus or elsewhere if there was fruit to be bought. A rival market at Odessa is also now springing into existence, and through it a small quantity of "Citrons for the Law" is finding its way into Eastern Europe.

The packing of the fruit, no matter where shipped, is conducted with the greatest pains, and after most careful selection. Each case contains 120 citrons, and each citron is wrapped round with very soft tow, every possible measure being taken to prevent the fruit from being bruised, and above all its calyx from being injured. Prices varied this year at Trieste from 3 fl. to 10 fl. for each citron, but more especially fine and perfect specimens reached 12 fl., or about 1*l*.

In consequence of the prohibition by the Rabbis of the Ionian Islands citrons, there has of late years been an enormous falling-off in supply. Probably not 50,000 "Citrons for the Law" with the calyx attached were sold in Trieste in 1893, but even this number represents a large sum of money changing hands for that one kind only.

A small quantity, 1,500 or 2,000 "Citrons for the Law" with the calyx, find their way to England annually.

It is not, however, absolutely necessary that the "Citron for the Law" should have the calyx, if from its peculiar variety it naturally has none that remains, but it must have been gathered from an ungrafted tree. Prejudice, however, is strongly in favour of those with the calyx, which bear the same ratio to those without as gold to silver gilt. Citrons without the calyx are imported for the Feast in considerable quantities from Bordighera in Italy, especially since the riots in Corfu.

It is difficult to separate the quantities of citrons imported by the Jews for their Feast from those for ordinary consumption, but the whole amount of citrons arriving at the Trieste market appears to have been about 5,000 tons in 1893, almost all of which was again exported to England, Germany, and the East of Europe for various purposes. None are exported to America. Quotations have been asked from Chicago, but no business resulted.

The anathema denounced against Ionian Island citrons by

the Rabbis of Poland and Russia has, however, it is stated, been or is about to be withdrawn.

The prune trade through Trieste suffered severely in 1893, Prunes. in fact it is said that the depression has been unprecedented.

There have been different reasons for this. One, it is alleged, is the abolition of the free port which drives the buyers to the places of production in Bosnia and Servia to avoid paying duty here; but it is the fashion now to put the blame for everything on the abolition of the free port.

A more substantial explanation lies in the falling-off in the demand from the United States, for which there are several reasons, but the depression may be only temporary, as should the proposed Wilson Tariff pass in its present form, the duty will be reduced on the basis of present prices by about 50 per cent.

This want of demand in America has caused prunes to desert Trieste in another way, for when they do not go to the United States they are almost entirely sent to Germany, consequently there is no need for them to come near this port at all.

The factors which govern the prune trade in America are, the Californian prune crop, and the apple and apricot crops there, which last year were most productive. The Californian prunes are always at the top of the market, being very fine fruit, and no doubt chiefly compete with the French prunes. On the other hand American apples and apricots directly affect the Bosnian and Servian prunes, because the former can be and are used as substitutes by the German population of the United States, who eat the fruit with their meat whether it be prunes, apples, or apricots, whichever is cheapest.

It is said also that the trade is being permanently affected by the gradual assimilation of the Germans to the native Americans, as in the second generation they give up eating fruit with their meat, becoming in habits like the ordinary Americans.

The McKinley Tariff too has much injured the prune trade through Trieste; the duty comparatively speaking is enormous, being 2 c. per lb. Under the proposed new tariff the duty will be 20 per cent. ad valorem.

The prunes now shipped from Trieste are packed in boxes, being previously prepared in the French manner by steaming.

In former times they were simply sorted and shipped in large casks holding 13 cwts. or 14 cwts. of prunes each. This was altered partly in consequence of the steamship companies placing a differential rate of 2*s.* 6*d.* per ton upon the casks, which gave much trouble, as against bags and boxes which were more easily stowed and less damaged in the hold. But the falling-off in the prune trade has affected British shipping interests materially. 8 or 9 years ago it was no uncommon thing for large steamers to leave Trieste with full cargoes of prunes alone, whereas now the quantity shipped on board a single steamer rarely exceeds 200 tons.

There is a small trade to England in prunes through Trieste,

Macaroni.

but it is very small, as in England prunes are only used for desert, the sweeter French prunes being preferred.

Macaroni is manufactured in Trieste upon a large scale both for local consumption and for export, which latter, however, is practically only undertaken by one house at present.

During 1893 foreign trade in this article was very slack in comparison with former years, in consequence of the mercantile depression in England, Australia, and America.

The United States McKinley Tariff greatly injured the Trieste trade, for it is said, that but for this, competition would have been impossible in this branch of commerce with Austria and Italy, as the climate and water of the United States is unadapted for the manufacture of macaroni.

As far as England is concerned, notwithstanding that prices offered by London houses have been accepted in Trieste, the London houses have been unable to dispose of their stock except in small quantities.

A great macaroni firm here state that where during the last few years in the month of November it had sent 50 cases to one house in London, in 1893 only 5 cases were sent. This great falling-off seems to be entirely due to the depression which is the greatest difficulty the trade has had to contend with, for instance, during the last few years freight has affected prices little or nothing; it is said that as times improve in England a fresh impulse will certainly be given to the industry here.

Large shipments are made to Australia, but none go direct at present, all the macaroni for that market passes first through ports in the United Kingdom.

In England, Australia, India, and the United States, Trieste macaroni competes very satisfactorily with that from manufactories in Italy; but in Brazil it is otherwise, because, it is alleged, the Genoese and Neapolitan firms are better represented there by agents and commercial travellers. The recent disturbances there too have nipped in the bud efforts made in Trieste to correct this.

Practically there are only two kinds of this food exported to England, namely macaroni and vermicelli, and to India and Australia it is the same, but there are no less than 34 other forms of the manufacture made in Trieste, all from the same flour, which though unknown in England, &c., have an enormous sale here. Probably some of these varieties could be introduced into England with profit by enterprising salesmen.

It is difficult to get at the exact value of the macaroni exported from Trieste, the one house exporting naturally declining to divulge the extent of its trade. The great manufacturing houses here are never visited by commercial travellers from England; this probably has contracted the trade in macaroni with the United Kingdom, but has had the effect of keeping up prices.

Sugar.

There was a large increase in the sugar trade through Trieste in 1893, something over 153,000 quintals (of 100 kilos. each) more

than in 1892 having been imported from the interior. Of course it was all beetroot sugar.

Of this amount about 75,000 quintals were used for local consumption and the remainder, some 812,000 quintals, was exported. In the above amount is included about 40,000 quintals of powdered sugar, the greatest part of which went to the sugar refineries in Italy.

Of the total amount exported, Turkey took 376,110 quintals; Egypt, 72,810 quintals; Greece, 64,025 quintals; Italy over 40,000 quintals. The rest was distributed in smaller quantities in the Black Sea and other directions.

But in this article of trade as in so many others Fiume is competing successfully with Trieste, in consequence of the smaller market and freight expenses there. Growers in the interior find it to their advantage now to send their sugars rather to Fiume than to Trieste.

The export of oak staves for making casks was formerly very large from Trieste, but it is falling steadily year by year, the trade now apparently passing through Fiume. Oak staves.

In 1893 almost 7,000,000 staves only were shipped from Trieste; in 1892 a little more; as far as this port is concerned it is a dying trade. Most of the staves go to France.

In the Trieste commercial report for 1892, attention was drawn to the importation of fustic dyewood from Greece and it was mentioned that for some reason none of it found its way to England. This has already become altered as during 1893 several parcels of 30 tons or 40 tons each were sent to Liverpool. Fustic dyewood.

The total import of this valuable dyewood into Trieste last year was about 800 tons, and most of it came from Parga, in Greece, and Durazzo, in Albania, in the form of branches, roots, and small timber. Most of it is used up in Germany, Austria, and Italy, where they have in the dyeing factories special machinery for cutting up the wood.

Formerly it appears that England took some of the branch wood only as it was easy to cut; but on the resumption of the import last year, roots were also sent to the United Kingdom, with which country the trade now seems likely to increase.

The recent institution of petroleum refineries at Trieste and Fiume is an enterprise of some consequence which has been touched on in former reports. It has not affected British trade to any great degree, except indirectly lately. The local competition injured the demand for American oil, but if British shipping bringing it suffered in consequence from the United States, it has been employed since in transporting oil from Batoum, so on the whole there was not much loss in the carrying trade. Lubricating substances.

But recently the refineries have taken to converting their waste into lubricating substances of great value and at a very cheap rate, and the local manufacture of course paying no duty, has put all competition from other countries in this industry out of the question.

Formerly, English houses did considerable business in greases (1718)

through Trieste, but it is to be feared that further enterprise in this direction is impossible from the United Kingdom.

Colour oils
and inks.

The same may be said of colour oils and inks, but this loss of trade seems to be due to the closing of the free port. Before that event the profit was but small, and the imposition of duty apparently at once destroyed all competition with the local industries.

Fisheries in
Dalmatian
waters.

During 1893, the fisheries on the Dalmatian coast in the neighbourhood of Spalato were remarkably productive, and nearly double the amount was salted than in the previous year, altogether 30,278 barrels valued at 492,353 fl.

Fresh fish, to the value of 73,785 fl. was sold to the three sardine manufactories at Comisa alone.

Prices also rose. This is attributed partly to the increased demand for the new manufactories, but especially to the failure of the fisheries last year on the coasts of Africa and Portugal.

New
industries.

The new industries started during 1893 in Trieste and this consular district, in which a certain amount of capital has been invested, are as follows:—

Vegetable oil
manufactory.

A concession has been granted for the constitution of a company to be called "The Shares Company for the Manufacture of Vegetable Oils," to be situated at Trieste. The share capital is fixed at 1,500,000 corone, divided into 3,750 shares of 100 fl. each, fully paid up, and the Company has power to increase the capital to 3,000,000.

The Company will erect its oil manufactory at Trieste, and will subsequently found other branches in various parts of Austria.

Rice-peeling
factory.

The building of the new rice-peeling factory, the first of the kind in Trieste, is being rapidly pushed on, and will start with an annual production of 400,000 quintals. The production illustrates the probable importance of the establishment, which will be able to meet the demand for peeled rice in various parts of Austro-Hungary which are now supplied from abroad. The plant will be so constructed as to supply even an increased demand, if such should arise.

The factory is situated near S. Andrea, and is probably to begin working in March, 1894.

Coffee
husking.

A society for husking coffee has also been established.

Fishing tackle
manufactory.

Likewise one for the manufacture of fishing tackle, some demand for which has arisen on account of the proceedings of the Austrian Fisheries Society, elsewhere touched on in this report.

Earthenware
manufactory
at Sebenico.

An earthenware manufactory has been started at Sebenico, where works are also in progress to utilise the water power of the River Krka for the installation of the electric light, and for furnishing motive power for other industries.

Macaroni
factory at
Cattaro.
Alimentary
productions

At Cattaro a new macaroni factory has been started.

During 1892 the Anglo-Austrian Bank took over the French manufactory for alimentary productions and sardines à la Nantes in Isola; since its taking over by the bank, the industry has

greatly increased. During last autumn, a large quantity of pre-served meat was prepared for the Austrian army.

British shipping interests at Trieste are considerably affected by a comparatively recent arrangement on the part of the Hungarian Government in favour of the Adria Royal Hungarian Sea Navigation Company respecting the export of flour from Fiume, which practically renders British competition impossible except by agreement with the Adria Company.

and sardine
manufactory
at Isola.
Subsidised
flour through
Fiume by
Hungarian
Government.

This matter was referred to in the Trieste Commercial Report for 1892, but as the statements therein were contradicted in one very influential English newspaper (and possibly in others), it may be well to return to the subject.

To see what foundation there was for the contradiction, enquiries were made at Buda-Pesth from an authentic source, with the following result:—

The Hungarian State Railways in 1893, in order to encourage the Adria Steamship Company which is favoured and subsidised by the Hungarian Government, have agreed to return to Hungarian mills on the railway freight to Fiume, on all flours shipped aboard Adria steamships via Fiume, 24 kr. on each 100 kilos. if bound for English ports, and 27 kr. on each 100 kilos. if bound for Brazil.

This agreement has been renewed for the year 1894 with all the above conditions.

Until the end of July, 1893, an arrangement was in force between the Adria Company and the mills agreeing to a maximum rate of freight of 16s. per ton for English ports. Since then the rate has been agreed upon from month to month according to the alteration in shipping freights.

The mills in accepting the said facilities offered by the Hungarian Railways, begged that the proposed exclusive shipment per Adria Company should be omitted, but the Railways backed by the Government have refused.

After this refusal the mills tried to arrange with the Adria Company for a fixed maximum rate for the whole of the year. The Adria Company, after various negotiations, proposed the rate of 14s. 6d. against 14s. proposed by the mills, and, finally, the Adria Company granted 14s. 3d., but so far without obtaining the consent of the mills to this rate.

The two parties being thus unable to come to an agreement, the mills have claimed the intervention of the Minister for Commerce.

This was the state of affairs in January, 1894, and is probably unaltered yet.

The Union Bank at Trieste aided by the Austrian Lloyd's Competition Steamship Company (the new administration of which is always striving to develop the trade of Austria) after due inquiries decided in the early part of 1893 to attempt to establish an export trade in salt to British India from Trieste, or more correctly, from Pirano near Trieste.

in the salt
trade from
Austria to
Anglo-India.

The first cargo, as a test cargo, was despatched for Calcutta (1718)

direct on August 10, and upon the result of that experiment depends the continuation of the enterprise. Apparently, however, it has proved a success, as early in November an extra Austrian Lloyd's steamer sailed with another 1,500 tons of salt from Pirano for the same destination, and possibly others since.

The principal condition is that the quality may agree with the East Indian demand, and if this can be arranged, Austria will participate with England, Germany, and Italy in the salt trade to the East Indies, the magnitude of which to Calcutta alone is very great.

Warehousing
charges.

Great anxiety has been expressed in Trieste at the competition of Fiume as a commercial centre, and certainly some anomalies still exist which unduly favour Fiume. But there is a prospect of an adjustment soon taking place when the Government takes over the warehouses from the hands of the municipal authorities, which it is said is to shortly happen. (On April 1, 1894.)

One of these present anomalies, however, is in respect to the goods and passenger traffic at Fiume as compared with Trieste, and especially in the direction of warehousing.

At Trieste goods arriving can stand free of rent at the railway warehouses for three days, and goods being sent away can stand free for two days only.

But at Fiume the time allowed free for goods on arrival is three weeks, and for departure eight days without rent.

Consequently there is great incentive for both export and import trade to leave Trieste for Fiume.

The question of rent of warehousing will still more plainly show this, and if not adjusted Trieste would remain in her present position of disadvantage (as compared with her rival port) with very serious consequences.

Rent at Trieste by cubic measurement is 8 fl. 50 soldi per square metre per month, at Fiume it is only 1 fl.

In mentioning, too, the rent of a few of the more important articles of commerce per wagon load per month, the enormous difference between the two ports will be appreciated:—

Articles.	Trieste.	Fiume.	Increase at Trieste.
	Florins.	Florins.	Florins.
Coffee	10	1	9
Pepper	12	1	11
Cinnamon	20	1	19
Sugar	5	1	4
Raisins	12	1	11
Corn	5	1	4
Flour	5	1	4
Prunes	10	1	9
Oil	8	1½	6½
Wine	7½	1½	6
Tanning material	10	2	8
Cotton	6	1	5
Manufactured goods	20	4½	15½
Skins	12	2½	9½
Paper	8	1½	6½
Hardware	20	4½	15½
Glass	12	2½	9½
Sulphur.. .. .	8	1½	6½

The passenger traffic from Fiume is also favoured to Hungary as against that from Trieste.

A passenger from Fiume to Buda Pesth pays about 6 fl. second class.

A passenger from Trieste to Buda Pesth would have to pay at least three times as much.

But, on the other hand, in reality the passenger traffic is not so much affected as might be supposed in favour of Fiume, because the train from Fiume over the Hungarian State Railroad takes several hours longer than from Trieste or from Fiume by the Southern Railway, which charges the higher fares from both ports.

In consequence of a recent agreement between the Austrian Lloyd's and the North German Lloyd's Steamship Companies, various movements are springing up for diverting trade and passengers through Trieste to the East that formerly passed in other directions. Amongst these is a "Hamburg-American Company" for the establishment of a better railway communication from the north to develop Austrian exports, in particular such as sugar and salt. Effort to divert traffic through Trieste from Brindisi.

A project is announced of the institution of an express train between Bremen and Trieste to run in conjunction with the arrivals of the Transatlantic steamships of the North German Lloyd's, and with the departure for the East of the Austrian Lloyd's vessels. This would divert passengers from America from the old route via Southampton, Calais and Brindisi to a new one through Trieste.

During the latter half of 1893, in consequence of the depreciation of Italian rente, a delegate from the Italian Treasury arrived at Trieste to take affidavits as to the paper held here. Italian rente in Trieste.

The result has shown that the following amount in Italian lire is in hand:—

(1718)

Description.				Amount.	
				Lire	c.
Italian rente, 5 per cent.	..	..	..	1,481,710	50
Obbligazioni ferroviarie Livornesi	..	..	..	3,687	50
"	"	Centrali Toscane	..	2,471	50
"	"	Canali Cavour	..	6,405	0
"	"	Meridionali	..	22,057	50
"	"	Mediterranee	..	28,575	0
"	"	Sicule	..	2,257	0
"	"	Vitt. Emmanuele	..	19,535	0
Italian rente, 3 per cent., due in October	..	..	..	300	0
Total	..	..	..	1,566,999	0

From the above schedule it is evident that Trieste has about 60,000,000 lire invested in Italian rente. The calculation is very easy as about 1,500,000 represents 3,000,000 for one year, which on the basis of 5 per cent. makes 60,000,000 lire.

In Italy it was thought that the amount of Italian rente existing in Trieste ought to have been about 100,000,000 lire, the 60,000,000 therefore arrived at has not been an exaggerated sum, for in it is not included the Italian rente possessed by Italian subjects here who receive their interest in paper money, and that belonging to the Insurance Societies, which although nominally registered in the great book of the Italian Public Debt is not subjected to the above affidavit operation.

From this large amount of Italian rente held by Italian and non-Italian subjects in Trieste, may be seen the great importance of Trieste as a market for Italian paper.

Trade catalogues, prospectuses, &c.
A subject of great importance to British commerce, but too little considered, is that of trade catalogues, prospectuses, price lists, &c.

As mentioned in a former report, all those sent to this Consulate are, by the kindness of the Chamber of Commerce, placed upon the public table of that institution, and from time to time the attention of merchants and tradesmen is especially drawn to them by the officials. These publications are frequently most expensively prepared, but they are generally printed in the English language, and that often nullifies their usefulness.

The standard of education in foreign languages is undoubtedly higher here than in England. Educated men are often acquainted with several, and all with one or two languages besides their own. But even amongst the tradespeople most of them know something of either English or French, besides the numerous tongues of the neighbourhood.

This in itself is of great assistance to British trade, but it is not sufficient. The English trade publications should in turn be printed in the language of the district they are intended for. If this was always done there is no doubt that a fresh impulse would be given to British enterprise.

Local merchants, tradesmen, and salesmen may be colloquially

well acquainted with English, but at the same time will not take the patience to look at an English prospectus, which entails on them difficulty and loss of time to read. Bearing this in mind, it may be interesting to specify the languages chiefly spoken and understood in Trieste and the surrounding country.

By the census of 1890 the population of Trieste consisted of 157,466 persons, of whom 1,995 were soldiers. This number was made up of over 12 different nationalities, but the vast preponderance of 119,727 souls were Italian speaking, and now that number is much increased. It is evident, therefore, that all catalogues, prospectuses, &c., should be printed in Italian for Trieste.

Next to the Italian element come the Slavs to the number of 27,725 in 1890, but in the town itself and immediate suburbs all these are acquainted with the Italian language.

Then in a great minority come those speaking German, who, counting the military, only numbered in 1890, 8,147 people. German is the official language in some of the public offices, but otherwise it is seldom heard.

The remainder of the population is made up of many different races. English-speaking people in Trieste in 1890 were only reported at 155 in number, but there are many more British subjects than that residing in the town.

For the employment by merchants and tradesmen in Trieste there are other strong reasons why trade publications should be printed in Italian. Political feeling runs high, and, on the whole, there exists great prejudice against even reading some other languages.

With respect, however, to the surrounding country and Dalmatia all this is reversed. Only a mile from Trieste in every direction but one (that is along the coast) the population is Slav, and only speaks Slav.

For these people Slavic translations should be specially provided if prospectuses are sent at all. English versions would be absolutely useless, those in German of only occasional value, and those in Italian only useful in the southern towns on the sea board, where, unlike in Trieste, that language seems to be commencing to be discouraged.

Merchants and tradesmen in England who require local information respecting trade matters are recommended to make more use of the Chambers of Commerce for that purpose than is done at present. As a rule such enquiries are most obligingly attended to, and the replies are as full as possible, but the correspondence should be conducted in German for Laibach, and in Italian for the other Chambers of Commerce in this Consular district, of which there are altogether seven, namely, at Trieste, Gorizia (Görz), Laibach (for Carniola), Rovigno (for the whole of Istria), and in Dalmatia at Zara, Spalato, and Ragusa (for Ragusa and Cattaro).

Chamber of
Commerce
in Trieste
Consular
District.

*Shipping and Navigation.*Shipping
through
Trieste.

By far the largest amount of shipping through Trieste in 1893 was carried on by Austro-Hungary, which headed the list with 5,660 ships (steam and sailing, but mostly sailing); Italy ranked second, with 1,805 ships (steam and sailing, but mostly sailing); and England third, with 156 steamers and one sailing vessel.

The year 1893 showed a small increase in the shipping of Trieste, which exceeded that of 1892 by 139 vessels, of considerable aggregate tonnage.

With the exception of Italy and England, other nationalities contributed but an insignificant contingent of shipping.

The direct trade between Trieste and Great Britain and her colonies showed during 1893 a decrease of one vessel as compared with 1892. The collective tonnage, however, is considerably greater. Chance British vessels (indirect trade) show a small increase.

Building
yards.

In Austria during 1893, 46 building yards were working, employing 3,637 workmen.

In Trieste and the surrounding districts there are 24 building yards, in the Lussinpiccolo district 11, and 11 in Dalmatia.

But with the exception of the Stabilimento Tecnico (with 1,376 workmen), and the Austrian Lloyd's Arsenal (with 1,641 workmen), both at Trieste, all are very small and of no importance.

During 1893 there were built:—

	Number of Vessels.	Tons.	Value.
			Florins.
Sailing	8	440	56,686
Fishing boats	204	458	36,490
Steamers	5	6,658	1,466,000

Repairs.

During the same year there were repaired:—

	Number of Vessels.	Tons.	Value.
			Florins.
Sailing	163	7,765	39,918
Fishing boats.. .. .	394	4,367	145,971
Steamers	137	163,714	1,882,284

Wrecks.

Shipwrecks (strandings) during 1893:—

	Number of Vessels.	Tons.
Sailing	18	6,374
Fishing boats	2	7
Steamers.. .. .	1	210

Ships sunk in Austrian waters from November 1, 1892, to October 31, 1893:—

Nationality.				Number of Vessels.	Tons.	Damage.
Austrian	..	..	..	11	415	Florins. 19,405
Foreign	..	..	..	..	..	..

Of the 144 steamers which Austria possesses, 74 belong to the Austrian Lloyd's Steamship Company, the remainder to small companies mostly engaged in the coasting trade.

In 1893 the financial result of the company was very satisfactory.

During 1892 the Austrian Lloyd's Company earned about 7,466,415 fl. by 1,660,477 miles of voyage.

During 1893 it earned about 8,596,360 fl. by 1,827,607 miles of voyage.

So that in 1893 for only 167,130 miles extra the company earned 1,129,945 fl. more.

This good result is due to different causes—1st, to the extension of the line to Japan. During 1892 the trial was made of a few voyages to Kobe; but in 1893 these voyages became regular and were increased in number. All the 12 voyages which, according to the contract with the Government, must be undertaken to Shanghai, will be extended to Kobe.

The six voyages that the Austrian Lloyd's Company are undertaking to the Brazils will be increased to eight.

The Austrian Lloyd's Company also came to an arrangement with the Adria Hungarian Company to increase their voyages to the Brazils to eight, so that during 1894 from the ports of Trieste and Fiume 16 voyages will be made to the Brazils. This will be most important for the development of the coffee trade.

In 1892 the line to the Brazils was not a success, but in 1893 yielded a much better result. Several Lloyd's steamers were also employed in the export of sugar to India.

An attempt was also made to develop free navigation (*i.e.*, not subsidised), and hereby the company not only profited, but also attracted to itself the attention of the shipping world. Thus, for instance, the Austrian Lloyd's Company transported 70,000 cases of petroleum from Batoum to East India.

The line from Trieste and Constantinople prolonged to Syria-Caramania, which was suspended on account of quarantine, has been again opened. Quarantine in Greece and Turkey was not favourable to the Austrian Lloyd's line, but it has now been practically abolished in these two countries.

The Austrian Lloyd's Steamship Company has not renewed the contract which was concluded in 1892 with the Bulgarian Government. According to this contract the company had, in return for a subsidy of 85,000 fr., to maintain a regular steamship

Austrian steam merchant fleet.

Austrian Lloyd's Steamship Company.

Extension to Japan.

To Brazils.

Agreement with Adria Company.

Unsubsidised extension.

Quarantine.

Contract with Bulgaria.

service between the Bulgarian ports of Varna and Burgas. This contract, which during the Philippopolis Exhibition (on account of the great number of passengers carried) had resulted advantageously to the company, did not pay after the closing of the exhibition on account of the diminution of passengers. It, therefore, ended on August 30, 1893, and the service is now performed by a Greek shipping firm.

Hungarian
flour.

The Austrian Lloyd's steamers when outward bound generally load for the Brazils with Hungarian flour, and in order to complete their cargo they call on their outward way at several foreign ports, such as Genoa, Naples, &c.

Coal.

The coal strikes in England have hitherto had scarcely any prejudicial effects upon the company, owing to the sagacious measures taken in due time by the directors, and to the diligence and zeal of the company's agent at Cardiff. The Austrian-Lloyd's line was provided with coal at moderate prices not only for the whole of 1893 but also for part of 1894. Besides this the company has stored coal in large quantities from Japan since the steamers extended their voyages thither.

The experiments made by the Austrian Lloyd's with Japanese coal during 1893 when the great coal strike in England was going on had been of great advantage to the company, for the price of Japanese coal is a very favourable one; also, steamers returning from the Brazils provide themselves partly with Brazilian coal.

The Austrian Lloyd's has again ordered its coal in England for the whole year. It has ordered some at the mines of Arsa, and at Sebenico, in Dalmatia; but it has been impossible to purchase coal in the interior of Austria (Moravia, &c.), as the price is too high on account of the heavy railway freight.

Union with
German
Lloyd's.

The Austrian Lloyd's and the German Lloyd's Steamship Navigation Companies have originated in union with the German and Austrian railways a combined service, for the purpose of attracting the great current of American travellers to their lines, and at the same time to facilitate voyages from Central Europe to the Levant, to America, and to India.

The German Lloyd's Company keeps at the disposal of this service its lines from America to Bremen and Italy, and will try to induce passengers travelling by railway from Naples to Brindisi to continue their journey with the Austrian Lloyd's. The German Lloyd's Company has abandoned its regular lines to the Oriental Mediterranean, and addresses passengers for those lines to the Austrian Lloyd's Company. The Austrian Lloyd's Company on its part will take passengers at Trieste and Brindisi for passage to Egypt, the Levant, and back, as well as to India.

The Austrian Lloyd's Company has provided for the sale of tickets at its offices in Austro-Hungary, the Levant, Egypt, and India. These tickets will be issued for all the lines in the Levant, for India and America, as well as for the intermediate railways.

These same tickets will be issued by the German Lloyd's

Company in Germany and America, and with coupons will be available for the lines of both companies, and also for the railways, under the name of "Verband Seeverkehr des Nord-deutschen und Oestreichischen Lloyd." The relative prices will be charged in dollars, marks, and Austrian florins in gold.

This arrangement offers to numerous American travellers the opportunity of crossing Austria both going and returning, and German and Austrian travellers can procure the combined tickets for the Levant and the East. Tickets round the world are also issued.

The Austrian Lloyd's Company has come to an arrangement with an English company by which the English company hands to the Austrian Lloyd's Company at Port Said, goods from the Indies destined for the Levant, the Austrian Lloyd's steamers agreeing to provide tonnage for the goods.

There has been some attempt to develop special Austrian exports such as beetroot sugar, and salt.

In 1892-93 four new cargo steamers were built. Three new steamers are designed (to cost 1,800,000 fl.) for both passengers and cargo. These will have a speed of 14 knots an hour and will be furnished with every comfort.

Although the competition for the construction of these three steamers was first announced as open and foreign, the order appears to have been absorbed in the local yards, presumably at a loss of money. Local feeling, however, had been very strong in this matter, and has probably had great weight in the placing of the contract.

The warehouses belonging to the Austrian Lloyd's Company at the new port have been lately sold to the Austrian Government for 1,130,000 fl. payable in ninety annual instalments. These annual payments are, it is said, to be used by the Lloyd's Company for the construction of new steamers. But, on the other hand, the use of the said warehouses is to be reserved for the future by the Austrian Lloyd's Company for the same 90 years, the company paying to the Government an annual rental of 45,000 fl.

Although the year 1893 appears to have been financially a good one for the Austrian Lloyd's Company, the shareholders must be satisfied with a modest dividend as expenses have arisen for the construction of the new vessels, &c. The reserve fund appears to have been exhausted by the old administration in providing for the dividends of former bad years.

It is alleged that with the view of contending against the recent competition of a Japanese line of steamers running between Bombay, China, and Japan, the Austrian Lloyd's Steamship Company are about to take energetic measures by reducing freights.

It is said that this is to be accomplished in agreement with the Peninsular and Oriental Company and with the Italian General Steamship Company (Navigazione Generale Italiana).

A matter of some interest here in shipping circles is the recent proposed competition with the Austrian Lloyd's Company in the Levant trade by another line of steamers.

Arrangement with an English company.

Beetroot sugar, and salt. New steamers.

Austrian Lloyd's warehouses.

Financial position.

Alleged lowering of freights by Austrian Lloyd's Steamship Company to China and Japan. Competition to the Austrian Lloyd's Company.

It is said that Messrs. E. and R. Fanta, a firm in Vienna (and Constantinople), are about to create a regular line of steamers to Constantinople with a weekly service, unloading there for the ports in the Black Sea, and touching every alternate week at Smyrna and Salonica.

This event was unexpected, the Austrian Lloyd's having been for so many years absolutely without competition by any Austrian line to the Levant. Sometimes an occasional steamer would load at Trieste for the Levant, but this could not be called competition.

It seems that the tariff of the new line is to be the same as that of the Austrian Lloyd's. The first steamer of it sailed from here on March 9, 1894.

New law for
Austrian
merchant
shipping.

A measure of very great importance to Austrian shipping was adopted in 1893, and one that will materially affect trade through Trieste in future.

So far back as 1885 an inquiry was ordered by the Austrian Parliament into the conditions of the Austrian mercantile shipping with the result that it was reported to be "in extremis," but nothing further was done, so that in 1872 there were but 162 merchant ships of 171,560 tons left on the list.

Consequently a Bill was introduced last autumn based on the official enquiry of 1885 with the view of ameliorating the conditions of the mercantile marine by subsidies direct and indirect.

The Minister for Commerce strongly supported the Bill, and special commissioners were appointed to report on it.

They did so very favourably, and it eventually became Law on December 27 last as originally presented, with the exception of a single amendment which was carried unanimously in substitution of Article VII of the original Bill.

Extracts from the Minister's speech during the discussion of the Bill, with copies of the report of the Select Committee on the Bill itself as first framed, and of its single amendment are hereunto appended.

It is confidently believed here that this exceptional Government help will put the Austrian mercantile fleet in a most satisfactory condition within a few years, but others again hold to the old opinion that an avowed policy of long continued state aid cripples individual endeavour and enterprise, and that this lift over the reef will only launch Austrian shipping interests into shoaler waters beyond. Time alone can decide this point, but probably British shipping interests will suffer little from the new Law in the long run, although it is the British competition in the carrying trade that is chiefly complained of.

The Minister for Commerce spoke as follows :—

Speech of
Austrian
Minister for
Commerce in
Austrian
Parliament.

"I am most happy to be able to support the project of the Government which, thanks to the care of my excellent predecessor, seems destined to better the commercial position of Trieste and Dalmatia and to give increase to naval construction in Austria. This is not the only duty imposed upon me as Minister of

Commerce, but it is, I assure you gentlemen, my great desire to increase commercial enterprise in our ports, and particularly at Trieste, and to make it what it should be. I am following the policy of the Austrian Government in all preceding periods.

"The Austrian Government has always adopted every means for the advantage and prosperity of the port of Trieste, and the only question that can be asked is, have all measures possible been taken for its welfare. Until now unhappily we must say that such an end has not been attained. For instance the conditions of transport by the railways to Trieste are not at present satisfactory.

"The main line, the principal railroad which puts the capital in communication with the port, is not in the hands of the State, and the tariff of transport for Trieste in comparison with that of other ports is yet too high. The conditions under which the general warehouses (Magazzini Generali) are conducted at Trieste are not at all favourable, not only do they not produce any profit, but the capital invested in these "Magazzini Generali" is unproductive. Notwithstanding, however, all these expenses the rent of warehousing at Trieste is still too high, particularly in comparison with Fiume, with which city Trieste has naturally been put into the position of a competitor.

"Inasmuch as specially regards the conditions of navigation, the great pains taken by my predecessor have bettered and strengthened them by supporting the Austrian Lloyd's Company with a heavy subsidy. By this step we hope that with a judicious tariff will be caused a reduction of freights for Transatlantic commerce, effecting a general reform of the tariff system in shipping interests.

"But what in the last few years has particularly depressed Trieste and the navigation movement is the condition of naval construction, and the open competition with our mercantile marine. If we take note of the statistics, we have before us the picture of our commerce, flourishing in the past, though then undertaken only by wooden sailing ships, whilst now it has fallen to the last extremity. There are many things that by their very nature cannot be checked in their course, such as great industrial progress, and in the system of evolution—competition, which one can seldom impede; but in this case a way must be created under healthy conditions, and thus the mercantile marine be enabled to trade everywhere where wooden vessels or iron steamers can trade now.

"The number of our mercantile steamers has increased in a most prodigious manner for a coast like ours and for a harbour like Trieste. Yet shipping movement in the port is extraordinarily slack, and we perceive with regret that this branch of activity and industry, which before used to give bread to thousands of people in Dalmatia and in Istria is falling-off. The new Law will bring a remedy for this evil.

"I do not wish to raise exaggerated hopes as to the efficacy of this Law, and I believe that we cannot promise to ourselves an immediate great awakening of the mercantile marine. Neverthe-

less we can neither ignore that by degrees activity will be re-established by it. After due enquiry into the subsidy of the Government towards iron steamers, in 15 years' time it will have covered one-third of the capital. Certainly, the fact that the shipbuilder, who builds to-day, can in the future receive from the State the third of his expenditure in the building of his vessel will be a most powerful factor. But he also who owns an old ship will receive to-day from the State some subsidy towards its redemption. But he who builds a new ship in Austria with native materials will receive, besides his premium of 6 fl., also 25 per cent. This is an endeavour very favourable towards encouraging national industries, a measure which demonstrates how interest in shipping is progressing and how national enterprise is in a fair way to support itself against foreign competition and effort.

"On the other hand, we must not be timid about the working of this new Law. If at present is kept in view the expenses of working and travelling they will not exceed the sum of 200,000 fl. per annum, neither do I think that in future this sum will be greatly exceeded, but certainly not soon, because our tonnage is still ahead of our cargoes. We do not suffer for want of tonnage in the vessels for export of goods arriving at Trieste, but we do suffer for want of goods for that tonnage at Trieste and Spalato and the Italian ports, and this is the point which shows the weakness of the ports and of the trade, and, to my way of thinking, it is in this direction that remedy should be dealt. Only in increasing the amount of goods necessity will then be felt for the increase of tonnage.

"As far as regards the collection of goods in our ports to give new life to navigation, I can only say that I agree with the wishes of all the Deputies, and especially with the wishes of the Deputies for Dalmatia, who, I believe, have sided with the opposition, nor do I intend to contest their desires." ("Molto bene.")

After speaking upon the intention of the Government to connect Spalato by rail with Bosnia and Herzegovina, and its desire to create it, if possible, a large port and important centre for commerce, the Minister continued:—

"It is understood that I shall try with all my might to raise again the trade of Trieste.

"Commerce must be considered the end and the result of economical conditions. It is not possible by law to create commerce in the ports. But truly industry has its reward in overcoming the competition of great capital, and in the commercial success which gives life to trade. To this end our policy is directed, and Parliament concurs without aims of party, but keeping in sight only the public good.

"In the general discussion on this subject I have not heard anyone object against the essence and principles of the Law in question, and therefore there is no need for me to take up its defence. I recommend it to your goodwill and approbation."

Austrian Mercantile Marine.—Treasury Commission.

During a number of years our mercantile marine has suffered a continual decline. Report to Austrian Parliament by Select Committee.

This is proved on examining the respective figures.

Even in 1882 our mercantile marine presented the following figures :—

	Sailing.		Steam.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.
On long voyages ..	281	141,659	67	66,443
Coasting lines ..	63	6,015	19	6,068
Total ..	344	147,674	86	72,511

Ten years later, in 1892, the following decline took place :—

	Sailing Vessels.	
	Number of Vessels.	Tons.
On long voyages.. ..	97	54,262
Coasting lines	45	5,413
Total	142	59,675

Hence a diminution in sailing vessels, both as to number and tonnage, of 60 per cent.

In vessels engaged in long voyages alone the decline amounts to 65 per cent.

As to steamships, the following are the relative data :—

	Steam.	
	Number of Vessels.	Tons.
On long voyages.. ..	68	79,185
Coasting lines	23	8,002
Total	91	87,187

Of these, 71 steamers representing 75,292 tons belong to the Austrian Lloyd Steamship Company.

Up to September 1, 1893, there was a further diminution of 11 sailing vessels, with an aggregate tonnage of 7,469 tons.

Were the decline in the mercantile marine to continue at the above ratio, its complete disappearance might be reckoned.

True, the above statistics show more favourable figures with regard to our steam navigation. There has been an increase in tonnage. But even this improvement when duly considered is not very significant. The increase in tonnage is chiefly due to the fact that the Austrian Lloyd's Company was bound to build larger vessels in order to cope with rival traders.

This evolution resulted in 10 new steamers, with 9,978 aggregate tonnage.

But this increase in our steamships bears no proportion to the decline of our sailing vessels, especially if we bear in mind the decrease in the long voyage lines, whilst the non-subsidized carrying trade is represented by no more than 13 steamers, 10,259 aggregate tonnage.

Two of the latter are attached to the Danubian and Black Sea Navigation Company, and a third to the South American coasting trade.

As to the causes which have led to the decline in our mercantile marine, these were fully investigated and shown in the enquiry instituted at Trieste in 1885. Subsequent facts have corroborated the conclusions then arrived at. The causes of the decline are partly of a general character, partly special. There has since been no increase in the demand for freight in our ports, especially in Trieste our most important emporium. This circumstance has led to a diminution in the shipping requirements.

As to our foreign shipping carrying trade in which our ships used formerly to be engaged actively and profitably, the competition both by sailing and steam vessels has become greater and keener than ever. The struggle is more bitter than ever owing to the depression of trade all over the world, and the result to ourselves is material loss.

Our shipowners not being in a position to deal with the crisis, unable to substitute their old ships for improved vessels, were obliged to get rid of their old stock even at a considerable sacrifice, which they preferred to a losing trade.

The few new ships bought of late years were taken up at a bargain by some of our shipowners, and not in view of an expected improvement in the immediate future.

If we consider the paucity of capital under which our shipowners are struggling, the actual condition of the mercantile marine is easily explained.

But the importance of keeping up our mercantile marine should not be overlooked, and still greater would be our mistake if we became careless in the problem whether our goods are carried by foreign bottoms or our own ships. Shipowners and merchants are linked in the same chain bound in the common-weal.

But further, the inhabitants of our coasts possessing limited means, and their soil not being everywhere fertile, they have during generations taken to navigation, in which they have ever

shown great fitness. Their hardly-earned savings were devoted to shipbuilding and navigation. In the actual decline of our marine the capital formerly thus employed has been otherwise invested.

This decline is a calamity for our people along the coasts (Litorale), and, besides, threatens to abandon our carrying trade to foreign bottoms.

For the foregoing reasons a remedy is generally and urgently felt and required.

What is invoked is a stop being put to the decline of our mercantile navy, and a fresh impulse which will allow it to cope with foreign competition and give the inhabitants of our coasts their wonted occupation and profits in maritime employment.

This scheme has become all the more urgent, inasmuch as in the other parts of the Empire (Hungary) Bills have already been voted tending to develop the mercantile marine.

The present Bill provides Government subventions under various provisions.

The shipowner is to receive a certain sum of money during a specified period that will enable him to effect his scheme.

Art. 1 establishes a State subvention under certain conditions as to the line of navigation to be undertaken.

Art. 2 provides for the sound state of the ship or ships meant for navigation, with a view to secure not only safety, but a favourable financial issue.

Art. 3 relates to the amount to be contributed by the Government, and the measurement of tonnage, seeing that steamships must provide space for their engines, and use more iron than sailing ships which are now built, at least in our docks, almost entirely of timber.

For other reasons steamers will be allowed many facilities, as their development is meant to be especially encouraged.

But in order to give a favourable impulse to our shipping yards in which iron is used in substitution for timber, a bounty of 4½ fl. per ton will be granted in favour of sailing vessels built of iron and steel, and 3 fl. per ton in the case of ships built partly of iron and partly of wood.

The period of the bounty to extend to 15 years in order to allow a fair trial.

The subvention to be lowered 5 per cent. each year following the first contribution. Thus the shipowner will be helped mostly in the commencement of his scheme and gradually left to his own resources.

Art. 4 refers to the home shipbuilding yards. These evidently require and deserve a subvention also.

But the subvention must be dependent, according to circumstances, on the greater or less quantity of native raw metal used in the construction of a ship.

Our shipbuilding yards are not numerous, because ships cannot be built in them at such low prices as in foreign countries where raw materials are cheaper. Nor could a shipowner be

deterred from purchasing ships already completed at the date this Bill shall become Law.

The premium, therefore, will be determined in such a manner as shall neutralise the difference between the cost of a vessel built in an Austrian shipbuilding yard and that of a similar one purchased from a foreign one.

Art. 5 extends the premium to home-built vessels afloat, provided they be not older than 15 years.

Such vessels are not to enjoy the same rate of premium to be allowed on new ships. Nor will the greater or less quantity of home raw material used in their former construction affect the State bounty premium, which is based on the encouragement the Government means to give to another naval construction.

Article 6 refers to ships older than 15 years. From their list (contained in Supplement 3) their number is limited to 81, having an aggregate tonnage registered 38,525.

A small premium is to be allowed on these vessels in order to facilitate their gradual elimination, their owners being the very class needing help in the transformation of their ships.

These old ships must be classed low in the Austro-Hungarian "Veritas" or other similar insurance association, but to obtain the State subvention they must be registered sea-worthy because, owing to the date of their construction, they could not be classed higher than B 2 mentioned in this scheme.

The above subvention is limited to 5 years' duration, based on a reckoning that these old vessels will be sold out of the merchant service within this period.

The scheme provides another kind of State subsidy limited, however, to special cases. This (Article 7) is a subvention of 5 soldi (1*d.*) to vessels engaged in the foreign carrying trade in order to facilitate ships carrying the Austro-Hungarian flag in their keen competition with foreign bottoms. A large share of this carrying trade is secured by foreign vessels, whilst our own ships go begging abroad for freight.

It is hoped that a Government subsidy to the latter class of ships would enable ships to and from Trieste to compete successfully with foreign ones.

But ships calling along our coasts are not to be included in this special State subvention whose object is based on considerations relating to our carrying trade with foreign parts.

Art. 8. Provides for the suspension of any subvention in cases where a ship lies inactive during more than 6 months (Art. 4); or in the case of premiums to shipowners of old vessels (Art. 6) who, whilst receiving a subvention, neglected to transform their ships and kept them idle.

6 months' time is given any such to effect repairs.

Art. 9. Refers to exemption of taxes hitherto paid by shipowners to the State under the head of carrying trade. But all arrears of the above tax are to be paid up to January 1, 1894, except in such cases as will be verified to be financially critical.

Art. 10. Deals with shipowners already receiving State sub-

vention for mail services or others in virtue of existing contracts or future ones.

These are not to be included in the number of shipowners hitherto enjoying no such aid. Also with industrial companies' ships plying with their own goods, such to be excluded from all State subvention.

Art. 11. Refers to date of payment of all State subventions which are fixed to be at the end of the year.

Art. 12. Refers to abuses that may be made by shipowners of State bounties.

Art. 13. Makes all ships receiving State subventions liable to be used as a reserve fleet in time of war.

Art. 14. Refers to the regulations to be observed in cases of contention, of claims and settlements.

Art. 15. Abrogates the Law (in date of June 19, 1890) in virtue of which all new steamships built in Austria were exempted from all Government taxes, as also sailing vessels built of steel or iron in this country, all such vessels being now liable to the provisions of the present scheme.

Art. 16. Establishes the date and duration of the present scheme.

This is fixed at 10 years, this being considered sufficient to develop shipbuilding and the carrying trade.

Art. 17. Names the commissioners to be charged with the carrying out of the Bill. These are to be the Minister of Commerce and the Minister of Finance.

Law on the Mercantile Marine Subvention.

Art. 1. Steamers and sailing vessels inscribed on the Austrian Register as performing long voyages or as engaged on extended lines of the coasting trade may, whilst the law lasts, avail themselves of the benefits to be conferred as per following articles :—
Austrian Merchant Shipping Law of December 27, 1893.

a. State bounty for general carrying during the year.

b. State subvention on distances performed in voyages.

Art. 2. Every steamship and sailing vessel above mentioned to receive a State bounty if engaged in the carrying trade.

1. If it be the property, at least for two-thirds, of Austrian subjects.

2. If more than 15 years have not elapsed since it was launched.

3. If it is registered under Class A, 1a, or 2 category in the Austro-Hungarian "Veritas" or that of a similar insurance association.

Art. 3. The bounty on the carrying trade shall be granted as follows :—

During the year subsequent to its launch:—

Class.	Description.	Per Ton (net).	
		Fl.	kr.
1	To iron or steel steamships	6	0
2	" " sailing ships	4	50
3	To wooden or mixed sailing ships	3	0

Said bounties to be lessened 5 per cent. each successive year.

Art. 4. The subvention will be increased by 10 per cent. in the case of sailing ships built of steel or iron in the national ship yards; and if constructed at least half with national raw material the subvention will be raised 25 per cent.

Art. 5. All ships claiming the privilege of Government subvention after the first year of the present Law, the bounty shall be reckoned from the date to which they have a right to it, said reckoning to be based on the scale as per Art. 3, until the 15 years after they were launched.

Art. 6. All ships inscribed up to July 1, 1893, on the register, when the 15 years shall have elapsed since their launch, shall receive during 5 years, dating from January 1, 1894, 1 fl. per ton net per year, provided they be classed B 2 in the Austro-Hungarian "Veritas" or other National Insurance Association.

Cancelled by
Amendment,
see p. 35.

Art. 7. The Government subvention (as per Art. 1a) on distances performed in voyages is to be granted to all vessels not engaged on the coasting trade that ply to and from Austrian ports, provided the voyage be not in the same track as that of lines already receiving State subventions.

This bounty to consist of 5 soldi or kr. per ton per every 100 nautical miles, the distance to be computed taking the shortest line.

Art. 8. Should a vessel remain without a crew, or idle in port for more than 6 months, it shall thereby lose all claim to the bounty (Art. 4) or premium (Art. 6).

Art. 9. All mercantile vessels shall be exempt from Government income or other tax beginning from January 1, 1894. Said exemption to last for 5 years.

During the 10 years this Law shall exist, all vessels built in national ship yards shall be exempt for 5 years from all taxes as above.

Art. 10. The present Law does not apply:—

- a. To ships already receiving State subventions.
- b. To ships that shall be engaged in regular lines by the postal administration.
- c. To ships belonging to an industrial establishment or engaged in carrying its own goods.

Art. 11. The payment of subventions shall be made at the end of each year dating from that of the launch of the ship. The premium on voyages to be paid on ship's return.

Art. 12. Ships built abroad shall receive the bounty on the carrying trade if under the national flag, but should they pass under a foreign one, they shall return all bounties previously paid to them by the State. Also in case of vessels built in Austria that shall have received State bounties are to return these, should they be sold abroad within the first 2 years they were launched.

Art. 13. In case of war, all shipowners availing themselves of the provisions of this Law not only benefiting from (Art. 9) exemption of taxes, shall be bound to place their ships at the disposal of the State against an indemnity.

Art. 14. The relative measures of this Law shall follow the usual course.

Art. 15. When this scheme becomes Law, the decree of June 19, 1890, with regard to the exemptions on shipping, shall be ipso facto abrogated.

Art. 16. This scheme shall become Law on January 1, 1894, and shall continue so during 10 years.

Art. 17. The Ministers of Commerce and Finance are charged with this Law.

During the discussion on the Bill, the following amendment was adopted in substitution of Art. 7 of the original Bill:—

“Ships mentioned in Art. 1 will receive the State bounty if engaged in the carrying trade outside the limited coasting lines (mentioned in the Act 65 of May 7, 1879), or for Austrian ports not touched by steamers plying in parallel lines receiving State subvention.”

Amendment
to Law of
December 27,
1893.

This is the only amendment made to the original Bill.

The good behaviour of seamen being such an important factor in shipping matters anything that tends to that end cannot but be of consequence. Therefore the institution of a Sailors' Home at Trieste is perhaps a matter of some interest to owners of vessels coming here and to others.

New Sailors'
Home at
Trieste.

For some years past the only thing of the kind has been a Sailors' Reading Room, at which neither board or lodging was possible. To try and check the evils of crimping with its deplorable results to British seamen it was therefore determined by the British residents to extend the Reading Room, which is far too small, into a regular Sailors' Home, and to do this it was found necessary to build a house. Steps were taken to obtain subscriptions, a suitable site has been purchased near the New Port, and it is hoped that the house will be ready for use by the end of August, 1894.

Meanwhile permission was obtained from the police to put beds for seamen in the Reading Room as a temporary measure. The result has been most satisfactory, upon one occasion only no less than 19 men were boarded there at one time for several days, all of whom would otherwise have had to have been sent to the Crimps Boarding Houses, with the usual results.

At the same time that permission was obtained to lodge seamen in the Reading Room other energetic measures were taken to get men to otherwise frequent the place. In this there was

no difficulty, and frequently there have been 60 or more men there in the evening, who all afterwards returned on board sober.

This points to the high appreciation the seamen themselves have of these institutions when wisely managed, and it is believed that when the Sailors' Home is built, the success will be even greater. The improvement in the behaviour of the men too whilst on shore has been very marked since they have had a decent place to go to; amongst over 4,000 British seamen visiting Trieste annually there has not been one single police case since January, 1893, or one case of drunkenness or misconduct in the Sailors' Reading Room itself.

One of the great shipping firms trading to Trieste has already largely assisted in this movement, and it is believed that the others will follow suit. The new house will contain every possible convenience for board, bath, and lodging.

Pilotage at
Trieste.

The attention of masters of British ships is drawn to the subject of pilotage at Trieste.

Whilst passing Pirano on his way to the New Port at Trieste, the master of the steamship "Rosina Mendl" was hailed from a boat bearing an anchor on her sail. Thinking it was a pilot compulsory for him to employ, the master stopped, took him aboard, and proceeded.

But on arrival at Trieste it was found upon paying him for his services that the man was no pilot at all, but only a fisherman, and that pilotage in Trieste is not compulsory. Upon this the master laid a formal complaint at the Consulate of having been defrauded, and alleged that he had heard that other masters had suffered in the same way.

Inquiry being made, however, it appears that fishermen on the Istrian coast are permitted by law to pilot ships into Trieste Harbour, and that the man of whom the master of the "Rosina Mendl" complained is accordingly authorised. Consequently masters are warned, first, that pilotage into Trieste is not compulsory; and, second, that if they are hailed by any person presumably a pilot they should, if they desire to employ a genuine pilot, request him to first produce his certificate. Fishermen although authorised to act as pilots are absolutely irresponsible in case of accident.

Hydraulic
cranes.

The loading and discharging of vessels in the New Port has recently been facilitated by the erection of hydraulic cranes, which besides hastening the work are an advantage to the vessels in unloading, as the expenses of the cranes per diem are borne by the receivers of the cargo discharged.

On the other hand, when a vessel is loading she has to bear the expense of the cranes, a sum of 9 fl. a day, which causes some complaint.

Customs
regulations
respecting
tobacco on
board vessels
arriving at
Trieste.

Masters of British ships visiting Trieste should most carefully acquaint themselves with the customs regulations respecting tobacco before coming here, or they and their local agents may be subjected to great difficulties.

The Austrian Law is that the gross weight of all the tobacco

on board (for the use of the crew or otherwise) must be on the manifest. In other countries it is usually the nett weight; consequently many English ships (especially those strangers to the port) arrive here with only the nett weight of their tobacco on the manifest.

This may subject the master to a very severe fine, especially if the case or box containing the tobacco happens to be a large or heavy one.

Again, before the ship is searched, every bit of tobacco aboard must be placed on the cabin table for sealing up until the vessel's departure. There is no exception permitted to this rule; even all the tobacco in the pockets of the men must be so collected. A portion is sometimes returned to the latter for consumption whilst in port, but this is only by favour, and is against the Law, which must be most strictly observed to avoid fine.

This latter regulation is frequently a mischievous one, and is much objected to by masters, but it must be obeyed. Taking the tobacco away from the men often compels the master to supply them with money to buy more.

There has, however, been a slight relaxation of the rules lately under the following circumstances, but it should not be taken as an excuse for neglecting the regulations.

The customs officers reporting irregularities receive a large proportion of the fines levied, and consequently in the latter half of 1893 the above-mentioned rule, respecting the gross weight of tobacco being entered on the manifest, was enforced with great severity. The fines threatened were often very large, and it was only by intense labour on the part of the ship agents and brokers that they were reduced. But the fines were not so great a loss in the end as the time expended in obtaining their reduction. The superintendents of the shipping offices were sometimes employed for hours visiting the different officials upon this errand, and their proper work became utterly disorganised in consequence.

The difficulty at last became very great, and representations upon the subject were made to His Excellency the Governor of Trieste with the happiest results. The complaints were fully inquired into, and considerable latitude has since been shown upon its being pointed out that such a thing as smuggling tobacco ashore by British seamen is practically unknown in Trieste, no such case having occurred for many years.

As a fair number of British vessels bring cargoes of coal to the port of Trieste, which cargoes they are almost always compelled by charter-party to discharge at any berth where the receivers of the cargo may order them, it may be of interest to shipowners to know that the Austrian Lloyd's Steamship Company have lately built a store for coal in a place which the "bora," or northerly wind, renders (in the opinion of many experts) unsafe for a vessel of large size to moor in. The "bora" blows very frequently here, and in the winter months with great force often for many days at a time. This store is built on the outside break-

Dangers of
discharging
coal at
Trieste.

water of the old petroleum basin, and vessels lie alongside broadside on to the "bora," exposed to its full force.

Dolphins and buoys to moor to have recently been laid down, but vessels generally have to shackle their own chains to rings in the quay on the opposite side of the basin for safety, a distance of about 80 fathoms. In addition to this the quay wall is entirely unprotected by fenders, and the edge of it is quite sharp, so that a light ship lying alongside during a "bora" would be certain to be driven on the wall itself, and with the list that she would have she would probably get her plates stove in. The force of the wind is such that ordinary wooden fenders are crushed up, and are of no use at all.

A still greater danger, because concealed, is a projection in the quay wall under water. It is the foundation upon which the quay itself is built.

It is the duty of the Marine Board (Governo Marittimo) to render this berth a safe one, and until it is done it is alleged by competent persons that no vessel should lie there during the winter months or when there is a breeze off the land.

The construction of the coal stores themselves is open to criticism, and it is certain that during the winter, owing to the condition of things, work may frequently be stopped for a week or more at a time by the "bora." This also is a point of great importance to shipowners.

There are four imperial royal nautical schools in Austria, situated respectively at Trieste, Lussinpiccolo, Ragusa, and Cattaro.

Nautical
schools.

The opening of the Corinth Canal was considered a matter of the greatest importance in shipping circles in Trieste when it took place in 1892, and much disappointment has been felt since at its not proving immediately a success in every direction; apparently sufficient allowance has not been made for the time required for getting such an undertaking as this into working order.

Corinth
Canal.

The Austrian Lloyd's Steamship Company sent a special officer to examine and report on the Canal in so far as it is adapted for the passage of its ships.

On the whole, the report seems to have been adverse, and it is concluded that under present conditions the Canal cannot be used by the Austrian Lloyd's ships with advantage. The difficulty of entrance under certain conditions of the weather, the depth of the water, and the lighting of the Canal seem to be the chief objections at present; but it is considered in Trieste that the importance of retaining the Austrian Lloyd's traffic will cause these defects to be shortly remedied.

Population and Industries and Public Health.

Population of
Trieste
consular
district.

The population of the Trieste consular district is composed as follows :—

	Number of Inhabitants.	Census.	Remarks.
Trieste with its territory ..	158,314	1893	Including about 2,000 military
The Austrian Littoral. Gorizia, Gradisca (two provinces) ..	219,156	1891	Without military forces
Istria	308,980	1891	Without military forces
Dalmatia.. .. .	522,028	1891	Without military forces
Carniola	496,694	1891	Without military forces

Comparing the present population of Trieste and its territory with the official censuses of 1857, 1870, 1880, and 1890, it shows a progressive increase.

The population of the entire consular district is also increasing.

The health of Trieste during 1893 was good as regards ^{Public health.} general diseases, but small-pox appeared at the end of 1892, and persisted during the entire year following. On the whole, the epidemic was of a fairly mild character, the average number of cases not exceeding 4 to 5 per diem. Other infectious diseases maintained their normal rate. Influenza appeared again in December, but in a milder form than the epidemic of the previous years. Speaking generally, the mortality of Trieste during 1893 was comparatively low; in spite of the small-pox epidemic there were 400 fewer deaths than in 1892.

The death-rate of Gorizia for the past year shows the high average of 26 per thousand. During the winter the usual catarrhal affections were prevalent, and a species of intestinal catarrh appears to have prevailed during the summer. Besides these there occurred also cases of sporadic diphtheria and measles. There was no case of small-pox.

The public health of Pirano during the year was excellent, that of Parenzo fair. In Rovigno the public health was exceedingly good, except for some cases of influenza which occurred at the close of the year.

The country people seem also to have suffered somewhat from malaria, which, however, did not attack the inhabitants of the town.

A good average of general health prevailed at Zara during 1893, though there occurred mild cases of scarlatina, diphtheria, &c. Sebenico is reported as having been free from all diseases. From Cattaro the report of the public health is generally satisfactory for the year, although influenza prevailed.

During the visit here of the new Minister of Commerce he ^{Promotion of local industries.} expressed a willingness to promote the development of local industries and trusted that capital would for the future show a better return of interest than had been the case in the past.

The industrial question is a most momentous one for Trieste, for after the abolition of the free port the establishment of local industries is the only possible way of restoring the prosperity which for the present seems to have deserted this place. Bright visions of an industrial future were painted by the supporters of the abolition of the free port, but hitherto these have fallen far short of realisation.

Local feeling is greatly in favour of Government support for trade, and points as a good example to the Hungarian Ministry which places every possible advantage in the way of the development of industries, a state of things which naturally induces confidence on the part of the capitalists.

Although the new Austrian Minister of Commerce seems desirous of supporting industrial interests, until easier and cheaper railway accommodation is provided extensive development of industries can hardly be hoped for.

Shipbuilding
yard
(Stabili-
mento
Tecnico).

The Stabilimento Tecnico with its dockyard at S. Rocco (Trieste) is about the most flourishing establishment of its kind in the Trieste consular district.

This yard not only displays perennial activity in sustaining its already acquired position, but it also endeavours continually to extend its sphere of activity. During 1893 there were launched at the Stabilimento Tecnico the paddle-wheel steamship "Baklanoff," constructed for the Russian Commercial and Steamship Company of Odessa, and the "Graff Platoff," also a steamer for the fire service of the port of Pola. A tug was also built here, for the Austrian Imperial and Royal Navy.

During the last 3 years 25 vessels, of the value of 20,000,000 fl., have been built at the Stabilimento Tecnico.

Domestic
servants.

The question of domestic service in Trieste merits some attention, as singularly enough with a supply greater than the demand the article is unsatisfactory, and it may be of interest to enquire into the causes of this.

In the opinion of the Consul there are two special reasons, namely the police regulations respecting servants, and the natural disposition of the class the servants come from, but of the two the police regulations seems chiefly to blame.

A system of compulsory registration is stringently enforced. Every domestic servant male or female being furnished with a book, containing first sundry rules in German and Slav relating to servants. Next are entered in German only the name, sex, date of birth, birthplace, nationality, creed, and profession of the servant, followed by a minute personal description stating stature, colour of eyes, eyebrows, hair, condition of teeth, &c. The remainder of the book consists of blank sheets upon which successive employers enter testimonials and remarks according to conscience or feeling.

No servant can seek employment without his or her book, and within a fortnight of a situation being entered the book must be handed in to the police office, where a clerk enters the name and address of the employer and officially endorses the pages.

The book is then given into the keeping of the master or mistress who should not return it to the servant until the day the engagement terminates.

According to the strict Law, however, the book should then be sent to the police office again by the employer, and not given to the departing servant at all, the employer being liable up to a penalty of 5 fl. if the book does not reach the police.

It is customary for the employers, in mutual protection, to add in the book the state of a servant's health on leaving, which on the ground of indisposition, may have simply taken place for the sake of a "masque," after which they would enter into a second place for perhaps only 2 days to obtain food, whilst looking for a third.

No dependence can be placed on a servant staying for a week, a month, or more, and they seldom or never attach themselves to any family no matter how long they may stay. 48 hours is a frequent limit as above stated, and the consequent discomfort to their employers can be imagined, who, if they are wise and can do so, will always import foreign servants in preference.

The Slavs with the Italian servants, equally consider themselves entitled to attend the numerous balls and entertainments provided for the lower classes, but if restrained they will go without permission.

When servants leave they are bound to offer their masters or mistresses the keys of their boxes that search may be made.

The best servants in Trieste are imported from the more northern districts where the German element predominates. These as a class are clean, honest, sober, intelligent, and respectable in dress and demeanour, and being much sought after command comparatively higher wages.

Wages, however, are less than in England, though in this very wealthy town and district they would gladly be raised for better service obtained.

Ordinary female cooks receive 10 fl. to 12 fl. per month (a florin equals about 1s. 8d.) together with their washing. Skilled cooks earn from 14 fl. to 15 fl. per month, but these require a kitchen maid to help them. Kitchen maids earn 8 fl. to 10 fl. per month. Housemaids 10 fl. to 12 fl. per month, but have to dress their mistresses' hair and do ironing. Lady's maids earn, if clever, 12 fl. to 16 fl. per month. Nurses from 8 fl. to 12 fl. per month, but are seldom trusted out alone with their charges.

Men servants earn from 16 fl. to 20 fl. per month with livery, washing, and often white shirts and working clothes. Men cooks earn from 30 fl. to 60 fl. per month. Of these there are very few in Trieste in private houses. Majordomos who fill up invitations, keep household accounts, and generally supervise, receive only 20 fl. to 30 fl. per month, and the pay seems insufficient for a position of such importance and temptation.

All the above rates of wages include board in the house of the employer, but wine and butter are never allowed to servants in Trieste, (as in France) save on feast days.

The wages on the whole are low, but to supplement them the practice of exacting gratuities on new year's day has been carried to a fine art and is a custom which cannot be broken down.

Public Works.

Moles and
breakwaters.

Very considerable repairs have been made by the Marine Board to moles and breakwaters during 1893 all along the Austrian coast line, especially at Fasana, Cassia (Island of Veglia), Lussinpiccolo, Zara, Sebenico, Berna, Lissa, Comisa, Lesina, and Lagosta, with a view chiefly of facilitating the coasting trade, which is receiving the greatest attention at the hands of the Government.

For the same purpose new landing places for the small steamers have been constructed at Molonta, S. Matteo, S. Eustachio, Lastona, Baosia, and Moringo.

At Zara a new wooden pier has been built, and at Castelnovo a mole for landing on, also to serve as a breakwater.

At Spalato in October, 1893, a new mole of some importance was formerly opened for public use and to support the railway traffic. It is 135 metres long and 20 metres wide, and will be most useful to trade.

At Bol, the old mole has been lengthened, also at Capodistria and Abbazia.

At Isola and Cruso, new moles have been commenced, also one at Pirano, which is also intended as a breakwater.

New lights.

At Verbenico and Bescanuova, the construction of the new moles has been finally completed in 1893.

During 1893, a new iron lighthouse has been erected on the southern extremity of Mula di Muggia Bank in latitude $45^{\circ} 39' 26''$ N., and longitude $13^{\circ} 26' 10''$ E. The light is a fixed white one.

Several new lighthouses have been instituted on the Dalmatian coast for which masters are referred to "Notices to Mariners," published by the Board of Trade.

Railroads.

The new Monfalcone-Cervignano Railway in the Austrian Friuli will be very shortly opened to the public. It is only a branch line, but it is proposed eventually to join it to the Palmanova-Mestre and Venice railroad, and to the San Giorgio line.

If this is done, much advantage to the trade of the Friuli will be the result as well as to that of Trieste, Istria, and Gorizia. This line also will bring Trieste nearer to Trento, the Tyrol, and to Bavaria.

The cost of the construction of the Monfalcone-Cervignano railroad has been about 1,700,000 fl., of which about 200,000 fl. was found by the provincial authorities of Gorizia, and the rest by Government.

The Laibach-Gottschee trunk railroad was opened to the public in October, 1893, the Minister for Commerce being present. This line has a length of 60 kiloms., but is to be carried on to Rudolphswerth, some 15 kiloms. further. It will be completed in 1894. When joined with Carlstadt and Sissek this railroad will

connect the Tyrol, Carintia, and Carniola with Croatia, Slavonia, Bosnia, and the Balkan States.

In September, 1892, the new and important military road from Grudda, near Ragusa, to Mrcine was formally thrown open to traffic by the Governor of Dalmatia. New military road in Dalmatia.

This road is an additional connection between Southern Dalmatia and Herzegovina and for commercial purposes will be most valuable.

Agriculture.

From the statistics published by the Minister of Agriculture it appears that the vintage of 1893 in this consular district was, on the whole, an exceptionally good one. Vintages and wines.

The quality of the wine in the Gorizia neighbourhood was most excellent. In Istria and Dalmatia too, most unusual good vintages were obtained and were more abundant than in 1892.

But the phylloxera has also been spreading to a great extent in Istria and round Trieste, and it is sad to see the extensive damage caused in places by that scourge which has brought great distress and ruin on many peasants.

In consequence of the excellence of the vintage in Istria and Dalmatia both provinces were visited by large numbers of foreign speculators, and Jews from Poland in 1893, who bought the crops and themselves made the wine. A great part of the wine too found its way to Fiume for export, amongst it much from white grapes for conversion into brandy.

The recent Commercial Treaty between Italy and Austria is causing a great introduction of Italian wine, much of which comes through Trieste where it is said a depôt is to be built to store it. In the first 6 months of 1893 no less than 588,748 hectolitres of wine was imported from Italy into Austro-Hungary, nearly as much as arrived during the whole of the previous year. Eight-tenths of it was white wine which being very clear is preferred to the white wine of Austria.

It is said that in order to stimulate this import, the Italian Minister for Commerce is also instituting a wine depôt at Vienna, which will probably be followed by another one at Buda-Pesth.

So far, Fiume has had the advantage over Trieste in profiting by this enormous import of Italian wine, through the present smaller expenses (warehouseing, railway, &c.) at that place, so often touched on this report, but this possibly will not last.

General Remarks.

It may be well to draw the attention of silk importers and silk growers to the silk-producing caterpillar of "Bombyx Lasiocampa Otus" existing on the coast of Dalmatia. New silk-producing caterpillar in Dalmatia.

Whether the moth is indigenous or has only comparatively recently appeared on the coast is not known with certainty, for it has but lately attracted the notice of entomologists.

The moth is somewhat similar in appearance to that of the

silkworm, but the cocoon is much larger, and the silk slightly finer and very white. The caterpillar does not feed on the mulberry, but on the evergreen or holm oak ("Quercus Ilex").

The discovery has been such a recent one that, so far, little has been done towards rearing the worm artificially, but its breeding has been commenced in one or two places, and perhaps with far reaching results to the silk trade.

Austrian
commercial
enterprise in
the Levant,
decay of.

A matter of some importance in shipping interests is the alleged decay of Austrian commercial enterprise in the Levant; and it is remarkable in view of the strenuous efforts of the Austrian Lloyd's and other companies in the opposite direction.

30 years ago the Austro-Hungarian flag in the Levant occupied a most important position, for 25 per cent. of the sea-borne trade was Austrian. Now, with the exception of Turkey, which is a little behind Austria even, the trade of most of the other Great Powers has gone ahead of this country.

The table below of vessels passing through the Dardanelles in 1857 and 1887 will show this very plainly, and also the enormous increase of British trade during that period. Since 1887 this fact has been still further accentuated in the direction of Austrian decline.

Country.	Percentage.	
	1857.	1887.
Austria-Hungary	25·5	3·75
Greece	17·0	9·71
England	15·7	63·68
Turkey	14·3	3·41
Italy	9·9	4·79
France	6·0	4·34
Other nations	11·6	10·32

Austrian
Society for the
Encourage-
ment of
Fisheries and
Sea Fishing.

A subject of interest, and one which may become of considerable importance, is the work being done by the new "Austrian Society for Fisheries and Sea Fishing," whose headquarters is at Trieste.

This society was formed about 4 years ago to encourage the fisheries on the Istrian and Dalmatian Coasts, and especially to introduce improved methods of fishing, and to aid the fishermen in their first attempts to employ them.

The society is chiefly supported by voluntary contributions, which have not been large, but the Government helps also by two small grants of money, the Minister for Commerce giving 5,000 fl., and the Minister for Agriculture 500 fl. annually. In view of the excellent work performed with the small means at the disposal of the society, the greatest credit seems attributable to its managers, who are practical men.

The chief points to which the society has turned its attention have been oyster culture, lobster culture, coral and sponge

fishing, and the deep sea fisheries. The improved methods adopted, after exhaustive experiments, for the encouragement of the industries seem to point already to a greatly-increased supply for which at first there has been some little difficulty in finding a market. It is anticipated, however, that this obstacle will be soon overcome.

I propose to touch upon each of the chief enterprises of the society in turn.

Oyster Culture.

One of the greatest successes achieved by the Austrian Oyster Society has been in its oyster culture, as it is able to sell its culture. oyster at the age of 20 months, instead of at 3 years old as in the English, French, and other Northern fisheries. The society's oysters are now being sold in Trieste at 19 fl. per quintal, or at about 1½ kr. each.

The artificial cultivation of the oyster has existed on these shores from time immemorial, nor is the reason far to seek. The natural advantages are extraordinary, the coasts being protected by banks from the force of the breakers.

Although oysters require salt water, yet a certain percentage of fresh water is necessary and desirable; also the molluscs naturally fatten and grow almost twice as quickly if they are always covered by the sea even at low water, as in the Adriatic, for this ensures a constant and uninterrupted supply of food. The currents must not be strong, or the spat is swept away, and the same holds good of the incoming force of the waves, which, if very powerful, would result in disaster to the molluscs. The coasts hereabouts present the most favourable conditions for the propagation of the oyster, and if, therefore, that natural propagation be encouraged with intelligence it should be an assured success.

The sandbanks by which these coasts are protected from the breakers serve also to diffuse and absorb some of the freshwater discharged into the sea from various springs and small rivers, thus preventing too great dilution of the sea water.

The first experiment in the formation of an artificial oyster-bed was begun in 1889, in a locality called "La Palazza," lying between the sandy bar outside S. Pietro d'Orio, and the shore of the Grado Lagoon. In this position the oysters, whatever the state of the tide, are always covered with water.

A space 300 metres long by 100 metres wide was marked out with piles, and within these limits the Grado fishermen were forbidden to collect oysters or oyster fry. The presence of the latter is amply explained by the fact that outside the bar at Grado there exists an ancient oyster bank, avoided by the fishermen for fear of injury to their nets. The spat of these oysters is carried by the tides and currents all along the Grado coast, and that which is driven into the shoals between the bar and the shore adheres to the innumerable shells which exist in this region. In 2 years' time the prohibition had resulted in the collection of

such an extraordinary number of oysters in the "Palazza" preserve as to render it probable that the place would become a natural breeding ground.

In the society's various experiments many kinds of collectors for the oysters have been used: tiles, whitewashed to give the oysters more easy adherence; faggots of bushwood, similarly treated; frames of larch intertwined with different kinds of boughs (preferably oak); iron frames, with vertical iron blades; and groups of faggots hung on a pallsade.

In the spring of 1891 the society placed 5,000 whitewashed tiles in the "Palazza" preserve. These were arranged in two ways, in step-like groups, and pyramid fashion. The latter was the more successful, not on account of any greater number of oysters adhering, but because they cling less tenaciously to the tiles grouped in pyramids, and therefore require less labour in detaching before being placed for further development in the safes.

The safes used for keeping the oysters consist of a wooden frame 1 metre long and 50 centimetres broad, and 20 centimetres deep, with sides top and bottom formed of galvanised-wire netting. An iron ring is inserted at each of the four corners for purposes of anchorage, and, as a rule, the safe is kept at a depth of about 2 metres below high-water mark.

About 11 months after the tiles had been deposited in the "Palazza" preserve the young oysters were detached from them by means of steel chisels, and deposited in the safes, the 5,000 tiles used having produced about 82,000 oysters.

The nursery for these little oysters was constructed in the Channel of the Moreri, lying east of Grado. It is about 800 metres long by 80 wide, with a depth varying from 5 metres to 8 metres. Near the centre of this channel, from one side to the other, four rows of piles were driven in about 20 metres apart. Each row was formed of 3 piles, 1 being driven into the centre of the channel, and the other two firmly driven into the ground on either side. A wire rope united these piles, and upon this the safes containing the young oysters were suspended about $1\frac{1}{2}$ metres apart from each other, and in 2 metres of water at high tide. Within 4 months the young oysters had so increased in size as to necessitate their distribution in a great number of safes.

The success of this first trial was such as to induce the society to obtain permission to start another preserve, and this was done at "Il Traggio," a shoal lying about a mile to the east of the "Palazza." At first sight it seemed as if the ground presented even more favourable conditions for oyster culture, as the depth of water was greater. About 1,100 kilos. of oyster mothers were strewn on the half-sandy, half-muddy bottom of "Il Traggio," and about 4,000 tiles were sunk at the same time for the young oysters to adhere to.

By the autumn, however, the superiority of the "Palazza" as a breeding ground was fully established, for upon the tiles strewn there about the same number of oysters as in the preceding

year was gathered, while at "Il Traggio" the result was disastrous, for scarcely any oysters had adhered to the tiles there, on account of a thick deposit of mud.

This was in consequence of the current not being strong enough to prevent the mud settling on the tiles, thus proving that it is useless to attempt the establishment of an oyster preserve in depth greater than that of the "Palazza."

The small hamlet of Zaule, situated at the extreme corner of Muggia Bay, has been the seat of artificial oyster culture from time immemorial, and although the method even now pursued is of the most primitive description, yet 32 families of fishermen earn their living by it. The Zaule cultivators use oaken staves, both as collectors for the young and nurseries for the older oysters. Long experience has shown that on the shallow shore outside the cove of Zaule, and along the coast which runs from S. Sabba to the headland of Servola, there exists always a great current, which carries the greatest part of the spat towards the land. Accordingly the Zaule fishermen place their collecting staves as nearly as possible with the line of this current, thus collecting great quantities of young oysters. About 20,000 staves are planted yearly during the latter part of the month of April to collect the molluscs. During October these are pulled up, and transported to the cove of Zaule itself, when they are driven into the muddy bottom about $1\frac{1}{2}$ metres apart, and where they remain for $2\frac{1}{2}$ years, as their size does not warrant their sale under 3 years' growth. These oysters have a most delicate flavour, and are almost exclusively sold in the market at Trieste, at about 50 soldi (10d.) per dozen. The usual harvest is about 150,000 oysters per annum, and, allowing for the cost of the staves, &c., each family engaged in this trade earns from 150 fl. to 200 fl. per year.

There are two objections to this mode of culture, first, for some reason unknown, the oysters collected and developed upon staves become very thick-shelled and irregular in shape, which naturally takes from their value for exportation; and, secondly, the staves themselves are liable to be attacked by the "teredo," or shipworm, which completely riddles them and causes them to break off, thus burying themselves and the adhering oysters in the mud, and causing great loss.

The same system of cultivation was tried near Muggia and at Isola by two private individuals, one of whom detached the young oysters from the staves and finished rearing them in safes; but this plan was not entirely successful, as although the oysters developed much more regular forms, they remained thin and of poor flavour, while those reared entirely on the staves had a flavour equal to the Zaule oysters.

In May, 1889, the Society for the Artificial Cultivation of Oysters determined to establish a trial station at Zaule also. About 120 metres from the shore an area of 100 square metres was enclosed by a palisade, the dimensions being 20 metres long by 5 metres wide, with a depth of 4 metres at mean tide. This

railing runs from east to west, with supporting piles at intervals of $2\frac{1}{2}$ metres. These piles are also $2\frac{1}{2}$ metres out of the water at low tide, and are driven 4 or 5 metres into the thick muddy bottom. Frames of wire netting 2 metres by 3 metres were hung round the palisade and intertwined with branches, for the double purpose of collecting the spat and preventing it from being again carried out of the enclosed space by any seaward current. Within this space were placed collectors of every kind and between them oyster mothers were placed in cages of wide meshed wire netting, so fixed that they hung $1\frac{1}{2}$ metres under water. During the months of January and March the first young oysters were detached from the collectors to the number of 40,000, and placed in breeding safes.

After this first trial the society resolved to increase the undertaking, and the enclosure was enlarged to 400 metres, half of which was to serve as a breeding, and half as a rearing ground. By November of the same year 85,000 young oysters had been produced. In May of the following year (1891) the same number of collectors were exposed as before. But during the summer months, which are the most favourable for the adhering of the young oysters, there appeared, however, an excessive growth of diatoms, which caused the collectors to be so covered with slime that the oysters could not attach themselves. At the beginning of the autumn this slime disappeared, and within a month many young oysters were observed adhering to the collectors; these could not, however, be gathered before the following spring, when they were detached, but only gave the poor harvest of 80,000 oysters.

In the spring of 1892 the society was obliged to relinquish the idea of extending its operations any further at Zaule on account of a petroleum refinery which was erected at S. Saba, and which polluted the water by infiltration. Accordingly the society only devoted itself to rearing the oysters then collected in 1890, 1891, and 1892. To obtain good results the area for breeding should also have been extended; this was, however, impossible under the circumstances, and therefore the oysters, not having sufficient space for adequate nourishment, remained thin, although of good shape and flavour.

Near Carpano an association was also started for oyster culture, but the water there being deep, it was quite impossible to apply the same conditions as at Zaule and Grado; accordingly, at Carpano branches and staves of oak are simply thrown into the water, and the adhering oysters are detached when their growth is sufficiently developed.

At Ponte, on the Island of Veglia, under the auspices of the prior of the convent there, a trial was made of rearing young oysters brought from Grado, and afterwards placed in safes supplied by the Fisheries Society. The attempt proved so successful that an oyster station has been established at Ponte upon the same lines as the one at Zaule.

At Lussinpiccolo the society conceived the ingenious idea of

hanging the collectors for oysters underneath a raft moored at a few metres from the northern shore of the port. Afterwards the oysters are detached and reared in safes with covers, so preventing injury from the John Dorys, which inflict great destruction upon the oysters.

At Bistrine, near Stagno, the simple culture of oysters is carried on by throwing oak boughs into the water, which at the end of three years are drawn out, and the matured oysters detached.

In many other places along the coast, as far even as Cattaro, oyster culture has awakened much interest, and has been attempted with more or less success; the difficulty seems to be to find a market for the oysters, for the cost entailed by rearing them in safes necessitates their being sold at too high a price to be within reach of the poorer classes. Trieste is the principal market, as in the more inland towns and Vienna the northern or Ostend oyster is preferred.

Sponges.

Recent experiments by the society have proved that the Sponges. sponge fishery on the Dalmatian and Istrian coasts may be made to yield infinitely greater returns if more adequate methods of fishing the sponges can be introduced. The industry is practised only by the inhabitants of Crappano, who dislodge the sponges by means of an eel spear attached to a long pole. This method presents two objections: first the impossibility of seeing the sponges beyond a certain very limited depth, even in the exceedingly limpid water of this region, and next the difficulty of keeping the boat stationary over the desired spot. Thus the fishing of the sponges which are visible is by no means secured, while an immense area of rocky bottom remains unexplored altogether, although well known to produce great quantities of sponges.

With a view, therefore, to the further development of this industry, the society has introduced sponge-fishing by means of divers according to the Greek method. This experiment has been amply justified by the result, for in a depth of from 20 to 30 metres these divers brought up splendid samples of sponges, some having gathered so many as 60 in an hour's work, an average of 1 per minute.

The average depth in which the Crapponian spearmen can see and secure the sponges is 6 metres in Istrian, and 15 metres in Dalmatian waters, as, owing to the muddiness induced by the River Queto in the latter, and the strong currents caused by the shoals in the former, sponge-fishing after the old method is very limited and unsatisfactory.

At first the Crapponian fishermen opposed the new system, but lately they have given proof of ample faith in its utility by forming an association among themselves to request instruction and the means for its introduction.

By the Greek method no possible sponge-producing ground
(1718) D 2

need remain unexplored, which is a very important point, since the sea bottom all along the Dalmatian coast is only regular from the shore to a distance of 20 metres, after which it falls suddenly 18 or 20 metres or more; the rocky bottom, too, presented deep fissures.

In these hitherto unexplored depths the divers have found splendid specimens of sponges, which proves that the Crapponian method of sponge-fishing with a spear was by no means thorough in its results.

The further development of this fishery, in consequence of the efforts of the society, will probably be attended with important results to the sponge trade.

Coral Fishery.

Coral
fishery.

The efforts of the society in the direction of the coral fishery on the Dalmatian coast have proved that there is an almost inexhaustible supply of coral if there was only a demand to meet it.

In the spring of 1892 two vessels were prepared and equipped by the society, and worked from the middle of April to the middle of September with very satisfactory results, if the coral could only be sold at a reasonable profit, but the large stock in hand at Naples and at Genoa has brought down prices very much.

In 1893 the Austrian society had 920 kilos. for sale, for which a house in Genoa has offered 38 fr. per kilo., but the society is holding out for 42 fr.; in the end it will probably obtain 40 fr.

The society is also trying to introduce the use of coral for in-laying work, which would certainly have a very beautiful effect; the larger pieces would probably be used for this purpose.

One branch of coral manufacture that possibly might be introduced into England, now Austrian coral is to be obtained so cheaply, is the Red Sea trade. The beads for this trade are oval in shape, and are all machine made. At present the seat of this manufacture is at Leghorn, where machinery is more expensive than in England.

Tunny Fishery.

Tunny
fishery.

With a view to improving the methods pursued in tunny fishing in the Istrian and Dalmatian waters, the society sent for an experienced tunny fisher from Sardinia, in order to ascertain if the large nets used in the Mediterranean could be employed with advantage in the Adriatic. His answer was in the negative, on account of the great and sudden depth of the sea at a very short distance from the shore, and also the exceedingly strong currents amongst and between the numerous islands.

The nets employed in Istria and Dalmatia are much smaller and of quite a different shape from those in other parts of the

Mediterranean; also they are shot in coves somewhat sheltered from the currents. A second net, called "pretek," of much larger dimensions, is used to close the cove when it contains a number of tunny which will not take to the first; in this case the capture of the fish is only a question of time.

The first tunny fishing season is during April, May, and June; the second, and the better one, during August, September, and October.

These two periods seem to cover the going and returning of the fish, although, owing to the winding nature of the coast, it is difficult to decide the direction taken by them.

All along the coast are look-out stations, consisting of a platform at the top of a pole. Upon this a man is constantly on the watch for the approach of the tunny shoals during the fishing season. As soon as he becomes aware of the approach of the fish he directs the fishermen, who are ready with their nets and boats, and they are thus enabled to lay the former in the very path of the tunny.

The nets used are of various kinds. At the Slana tunny station, situated in the cove of the same name on the northern shore of the roads of Pago, the "pretek" used to be sunk on the eastern side of the cove, with its mouth open to the north. Most of the fish coming along the west coast and the bottom of the cove entered this net, which was afterwards dragged ashore. Latterly, however, the owner of this tunny station has built a little port at its eastern extremity, where a boat with a "pretek" net 530 metres long is kept. As soon as the watcher, perched on a high rock, gives the signal that the tunny have entered the cove, the boat leaves the port and makes for the opposite shore, dropping the net as it goes. The tunny are then entirely shut in, and to catch them the fishermen continue dragging the net towards the bottom of the cove, or else use a smaller net inside the "pretek." But this method is expensive, as practice has proved the necessity for the second reserve net, because towards the middle of the cove there exists a rocky ledge where the fish can easily escape under the net.

Although the many indentations of these coasts prevent any precise forecast of the tunny route, and thus exclude the possibility of introducing the Mediterranean system of fishing, yet an improvement of the methods now practised in these waters is both possible and desirable.

Thus, when the "pretek" has been used for closing the coves, a marked improvement in the amount of fish caught has been observed. The use of this net is, therefore, strongly suggested and encouraged.

Again, nets are often set too near the shore, and although the fish may have taken the anticipated direction only a few enter therein, the greater number passing outside. Fishermen, therefore, are advised by the society to try and provide themselves with better nets, and to set them further from the shore.

Above all they are advised to endeavour to provide themselves

with "pretek nets," for with these the fisheries of both spring and autumn have been proved to yield quite 100 per cent. more fish than when the pretek is not used.

The Mediterranean tunny fisheries yield every season 250,000 kilos. to 300,000 kilos. to 1,000 fish, an amount which can never be approached in these waters. Consequently, it is not advisable to invest too much capital in this undertaking in Austrian waters, for, as has been before stated, the routes of the tunny here are not so certain as in the main sea. Sometimes they appear to be making for a certain point short of which they will suddenly stop and unaccountably diverge. Often, too, their old routes are abandoned, and the new ones are not always discovered. Local causes may also contribute to these changes, as in the case of the building of the New Port at Trieste and the making of the road to Miramar. These operations occasioned disturbances of the water which have scared the fish, and caused them to forsake one of their old routes, nor has it yet been ascertained in what direction they swim at present.

Another kind of net is also in use of the shape of an immensely long bag arranged spirally so that the course of the fish along it is labyrinthine. They finally, of course, find themselves in a "cul-de-sac," whence there is no escape. They are often kept a long time in this net, whence they are taken alive when needed.

At present there are no laws to protect the tunny fisheries, beyond one of 1808, which forbids the casting of nets for the capture of other fish within 200 fathoms of a tunny station.

The tunny fishermen have now requested the Austrian Society to also obtain for them the prohibition of ordinary fishing with nets at any distance under 2 kiloms. from their station.

Lobster Culture.

Lobster
culture.

Besides oyster culture, an attempt was also made by the society to introduce the artificial culture of lobsters, as in North America. All schemes, however, proved impracticable. If the young lobsters were set free they did not, as in Newfoundland, remain along these shores and coasts, but went right away. If any attempt to confine them was made, they immediately began to kill each other, thus rendering futile all efforts for their artificial production.

"Vallicultura."

Valley
culture.

The Austrian Society has been striving to stimulate fishing industry in the direction of what is called "Vallicultura" (or valley culture) by bestowing prizes.

"Vallicultura" is the artificial production of, or confining of, various kinds of fish by dams or banks across the mouths of

valleys or ravines opening into the sea. On the inside of these dams the earth is excavated to a greater or less extent and a mean depth of water obtained, and from these salt water ponds the fish are withdrawn as required for the market.

It is hoped that the encouragement given by the society to the improvement of existing valleys will lead to the formation of entirely new ones, for this branch of the fishing industry is very profitable.

Destruction of Harmful Fishes.

Among the various objects of the Fisheries Society must also be mentioned the destruction of sharks and porpoises, for which it bestows rewards. These creatures are most harmful to the fishing industries, the former by scaring shoals, and the latter by getting themselves constantly entangled in the nets which they break, and to which they cause much damage.

Illicit Fishing.

The society is steadily setting its face against all illicit means of fishing, but so far has not met with much success.

The abuse of fishing with dynamite especially continues in spite of the punishment of offenders. The surveillance exercised by the port, financial, and political authorities has been so far of little use in checking these malpractices, and in consequence the society has appointed a commission to study the question, and to draw up a Bill with the view of the further protection of the fisheries in Austrian waters.

Fishing Lamps and Tackle.

The society has also subsidised the manufacturers of lamps and lights for fishing purposes, in order to discover a modern and improved substitute for the old-fashioned pine torch hitherto in use.

It would appear that these torches have been procured from abroad, while the lamps will be produced in Austria. Thus the use of this new lighting apparatus will be a distinct gain to the fishermen, as yielding a better light, and to the country, as encouraging a native manufacture. Some newly-invented lamps have already been forwarded to Dalmatia, where very successful trials have proved their use and efficiency.

In many cases the fishermen are willing to try the new systems introduced by the society, but have not the means to purchase the necessary plant. The society assists in such cases by making grants for the purpose, without interest and payable in monthly instalments. Up to the present time (1893) it must be acknowledged that the fishermen are rather behindhand in their payments, but this is accounted for by a generally bad

fishing season, in which even the sardine fishery (usually the most remunerative) was more or less of a failure.

Hitherto Austrian fishermen have been compelled to purchase their fishing tackle abroad, as none was produced in Austria. Now, however, a firm in this country has opened a manufactory where they will be able to buy (see p. 16) thus encouraging a home industry, and it is anticipated making a saving in money at one and the same time.

Municipal
dog laws in
Trieste and
adjoining
territory.

In view of the importance that has recently been attached in England to the subject of hydrophobia and the control of dogs in towns, it may be of interest to detail the steps taken to that end in Trieste, where the regulations on the subject are probably stricter than anywhere else in Europe.

The result is, however, that there is certainly no hydrophobia, but it is made very difficult to keep a dog at all without the constant danger of his being seized and destroyed, and, in point of fact, there are very few dogs here. So, perhaps, the absence of hydrophobia may be as much due to the absence of dogs as to the stringent regulations respecting them.

In the month of June of each year every dog above the age of 3 months in Trieste and its surrounding territory must be registered, the name, sex, size, and description of the dog being carefully recorded.

A license is then given to the owner, and a metal tag (bearing the registered number of the dog) is also given to attach to the dog's collar, which must have clearly engraved on it the Christian name, and surname of the owner with his address.

This license and tag must be renewed yearly under a penalty of 10 fl (about 16s. 8d.).

The tax to be paid annually in advance on all dogs, without distinction of size, sex, or use within the limits of the town is 4 fl. (6s. 8d.), and for dogs in the adjoining territory only 2 fl. Watch-dogs, sheep-dogs, and dogs on board ship are exempt from taxation provided they are chained all day when not in active use, but for these is charged about 10d., the cost of registration and for the metal tag.

All dogs not above specified must be muzzled at all times or kept on the chain, and this rule renders it very difficult to keep a dog of any kind in or near the town. There are certain men called "dog seizers," whose duty it is to go about the city and adjoining territory day and night (not excepting feast days) catching dogs without muzzles on. They carry with them a flexible steel wire noose attached to a short handle; by this the dogs are caught and slung into a cart fitted for the purpose. This operation is not absolutely cruel, but it frightens a dog dreadfully, and leaves such a lasting impression upon its demeanour and courage that it is said it is always afterwards traceable in a dog that has once been so captured.

The dogs when caught are taken to a place specially provided for the purpose, and after 48 hours they are destroyed if not claimed.

If there is any dispute as to the age of a dog for taxation—

that is, as to whether it is over or under the age of three months—the point is settled by an approved veterinary surgeon. But, on the whole, the rules as to taxation are more liberal than those which obtain in England; for instance, if a dog is bought during the course of the year after the registration month of June, it must, of course, be registered at once; but the purchaser only pays in proportion to the number of months remaining before the following June.

Strangers passing through Trieste with dogs must obtain the tag within three days and pay the proportionate tax for one month. If their stay is beyond that period the license will be extended from month to month. Hotel keepers are made responsible for informing visitors of this rule, which also extends to military officers.

Anyone becoming possessed of an unlicensed dog must register it within 3 days in the same way as strangers. All the taxes go into the Civic Treasury, but the fines are handed over to public charities.

Any person discerning signs of hydrophobia in a dog and not reporting it is liable to imprisonment up to 3 months, even if no hurt has resulted; but if death to any person has taken place through neglect to do this, imprisonment up to one year is the penalty.

If it is proved that anyone sets on a dog to man or beast the punishment is 1 week's imprisonment; but this can be much extended according to circumstances and results.

On the whole, justified or not, there appears to be a nervousness, and caution exercised in all directions with respect to dogs unusual in northern Europe, but the result certainly is a success as far as hydrophobia is concerned.

A very amiable habit here during the summer is the universal custom of householders to place small tubs of water outside their houses and shops for the use of passing dogs; but as the poor brutes are often muzzled up so tight they cannot lap, the usefulness is much lessened.

Statistical Tables.

RETURN of all Shipping at the Port of Trieste during the Year 1893, compared with 1892.

ENTERED.

	1892.		1893.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Sailing	3,886	166,072	3,712	148,836
Steamers	3,820	1,306,142	4,133	1,426,075
Total	7,706	1,472,214	7,845	1,574,911

CLEARED.

	1892.		1893.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Sailing	3,833	164,567	3,722	149,632
Steamers	3,804	1,298,560	4,121	1,427,364
Total	7,637	1,463,127	7,843	1,576,996

Port of Trieste.

DIRECT Trade in British Vessels from and to Great Britain and British Colonies during the Year 1893, compared with 1892.

ENTERED.

Year.	Number of Vessels.	Tons.	Crew.
1892	158	173,036	4,226
1893	157	196,793	4,012

CLEARED.

Year.	Number of Vessels.	Tons.	Crew.
1892	97	110,389	2,595
1893	91	101,620	2,290

INDIRECT or Carrying Trade in British Vessels from and to other Countries during the Year 1893, compared with 1892.

ENTERED.

Year.	Number of Vessels.	Tons.	Crew.
1892	28	36,149	754
1893	34	28,496	644

CLEARED.

Year.	Number of Vessels.	Tons.	Crews.
1892	75	96,066	1,952
1893	79	100,992	1,898

RETURN of all Shipping at the Principal Ports on Istrian and Dalmatian Coasts during the Year 1893,
compared with 1892.

ENTERED.

Port.		1892.				1893.			
		Number of British Vessels.	Tons.	Total Number of Vessels.	Total Tons.	Number of British Vessels.	Tons.	Total Number of Vessels.	Total Tons.
Istria—									
Pirano ..	Sailing	..	..	1,287	22,520	..	..	1,312	24,044
	Steamers	..	..	1,439	97,727	..	..	1,964	124,394
Parenzo ..	Sailing	..	..	165	3,292	..	..	192	3,502
	Steamers	..	..	1,073	90,188	..	..	1,147	95,848
Rovigno ..	Sailing	1	100	668	21,437	..	..	644	19,850
	Steamers	..	..	1,334	205,153	..	..	1,255	202,394
Pola ..	Sailing	1	216	632	16,354	..	..	664	18,481
	Steamers	10	9,969	1,333	348,689	9	10,101	1,367	352,585
Dalmatia—									
Zara ..	Sailing	..	..	585	15,970	..	..	591	14,671
	Steamers	2	1,469	1,505	395,216	2	953	1,868	429,417
Sebenico ..	Sailing	..	..	560	19,542	..	..	488	17,227
	Steamers	..	..	1,567	233,423	..	..	1,684	262,502
Spalato ..	Sailing	..	..	1,047	32,253	..	..	961	22,243
	Steamers	2	1,973	2,050	455,556	..	..	1,998	466,310
Regusa with district	Sailing	..	..	1,833	54,328	..	..	2,059	58,047
	Steamers	1	1,121	5,704	935,598	3	2,251	5,224	973,209
Cattaro ..	Sailing	..	..	100	2,304	..	..	123	2,769
	Steamers	7	3,575	913	184,203	9	5,564	924	186,894

TRIESTE.

AUSTRIA-HUNGARY.

CLEARED.

Port.	1892.					1893.				
	Number of British Vessels.	Tons.	Total Number of Vessels.	Total Tons.	Number of British Vessels.	Tons.	Total Number of Vessels.	Total Tons.		
Istria—										
Piàno ..	..	..	1,280	22,460	..	..	1,298	23,783		
Parenzo ..	..	..	1,439	97,727	..	..	1,963	124,361		
	..	..	165	3,292	..	..	192	3,502		
Rovigno ..	..	100	1,073	90,188	..	..	1,147	95,848		
	..	..	670	21,577	..	..	641	19,725		
Pola ..	..	216	1,334	205,153	..	..	1,255	202,394		
	..	9,969	631	16,321	..	..	663	18,329		
Dalmatia—	10		1,383	348,689	9	10,101	1,367	352,885		
Zara ..	..	..	583	14,914	..	..	587	14,569		
Sebenico ..	2	1,469	1,506	396,677	2	953	1,863	429,417		
	..	..	560	19,542	..	..	488	17,227		
Spalato ..	..	..	1,567	233,423	..	..	1,684	262,502		
	..	..	1,030	31,721	..	..	953	21,473		
Ragusa with district	2	1,973	2,046	454,303	..	..	1,991	464,647		
	..	..	1,832	54,417	..	..	2,044	57,650		
Cattaro ..	1	1,121	5,704	935,598	3	2,251	5,224	973,209		
	..	..	90	2,104	..	..	115	1,900		
	7	3,575	913	184,203	9	5,564	924	186,894		

TRIESTE.

AUSTRIAN Mercantile Marine in 1893, compared with 1892.

	1893.					1892.			
	Number of Vessels.	Tons.	Crew.	Horse Power.		Number of Vessels.	Tons.	Crew.	Horse Power.
Steamers	144	97,407	3,071	117,155		141	89,219	2,939	107,491
Sailing vessels..	1,576	68,627	4,661	..		1,576	78,432	4,810	..
Fishing boats ..	9,311	21,786	21,566	..		8,575	20,744	10,371	..
Total	11,031	187,800	29,298	117,155		10,292	188,395	28,120	107,491

There are, besides, 34 yachts registered at the Imperial Royal Marine Board at Trieste (for whole of Austria) belonging to private persons.

POPULATION of the Principal Towns of the Trieste Consular District.

Towns.	Inhabitants.	Remarks.
Trieste	158,314	With military forces.
Gorizia (Görz)	23,000	
Lubiana (Laibach) in Carniola ..	30,505	
Istria—		
Pirano	12,325	
Parenzo (the whole Commune)	8,485	Without military forces. Of whom 1,035 are military.
Rovigno	9,724	
Pola	31,623	
Dalmatia—		
Zara	14,080	
Sebenico	7,721	
Spalato	15,697	
Ragusa (the whole Commune)	10,391	
Cattaro	3,329	

LISSA.

Mr. Consular-Agent Topich reports as follows:—

In consequence of the general depression of the shipping trade our merchant navy has suffered severely, more so than in most parts of Europe, and is undergoing still further decay.

State subsidy
to merchant
navy.

In order to ward off total ruin, petitions were made to Government asking, as is done in other States, for a subvention, as well as exemption from taxes on mercantile shipping, so as to relieve it from its actual depression.

In reply, a Bill was presented in Parliament which was unanimously voted and became law on December 27, 1893; and on January 1, 1894, Government granted a subvention as well as exemption from taxes, but only in favour of steamships and sailing vessels making sea voyages, or engaged in extensive coasting trade, while small vessels engaged in limited coasting trade (petit cabotage) were excluded from the twofold benefit. These providential measures being thus limited, the very shipping that most needed help was left to languish in its struggle against the larger vessels which have been subventioned and increased in number.

Population.

The population of Dalmatia which in 1890 was 502,000 inhabitants, in 1893 reached 517,000 souls.

Industries in
Dalmatia and
islands.
Lack of
capital.

Besides the industries mentioned in the report for 1892, little else is to be noted in the way of trade. This is owing to lack of public enterprise and capital, both which are needed to develop the natural resources.

Foreign
speculators.

A few foreign speculators have taken advantage of the situation and have started some factories.

Fisheries.

In 1893 the fishing trade was prosperous in some districts, Spalato being the most successful and resulting in a total of 30,000 barrels (of 56 kilos.) anchovies, sardines, and mackerel,

representing a value of about 450,000 fl. In the waters of the Island of Lissa upwards of 25,000 barrels were made up, sardines being sold at from 14 fl. to 18 fl., anchovies at from 23 fl. to 25 fl., and mackerel from 13 fl. to 15 fl.

The three sardine curing factories at Comisa on the Island of Lissa in 1892, as mentioned in last year's report, encouraged by favourable results enlarged their operations, and in the 5 months' fishery (May to September), salted and preserved in oil, 1,660,000 boxes (tins) of sardines, and 20,000 tins of mackerel; representing 9,600,000 sardines, and 100,000 mackerel, and a total value (cost value) of 75,000 fl. Should the fishing in 1894 be as successful as the last 2 years, it is reckoned 2,500,000 tins will be turned out.

On the other hand, in the maritime districts of Zara, Ragusa, and Megline, the yield was unusually scanty, only 5,000 barrels being made, representing a value of 60,000 fl.

Owing to the enterprising action of a speculator encouraged by the local authorities, a new industry has been created at Comisa, in which the "Fisheries Society" of Trieste has also participated, leading to the establishment of a nursery for fish culture, giving satisfactory results especially in the breeding of lobsters and eels.

The eel fishery on the River Narenta gives an average of from 60,000 kilos. to 70,000 kilos. a year. The weight of each fish is from 80 grammes to 1,000 grammes, and they are sold at about 35 fl. per 100 kilos.; the total yield of about 8,000 fl. is chiefly disposed of in the Spalato market, only an inconsiderable quantity of the fish having been salted and smoked. This eel fishery is certainly capable of much further development. In proof of this assumption, it may be mentioned that lately the firm E. Warhaneck, of Vienna, that has an oil canning sardine works at Comisa, lately inspected the Narenta River, and by way of experiment had a barrel of fish salted which was pronounced first-rate on the market.

With regard to the public health, the province has during the last year been exempt from epidemic, and the average was generally satisfactory.

With reference to our railway communications, the long desired conjunction of Spalato with Serajevo, extending thereby to Arzanò-Tanijce crossing the most fertile territory of Bosnia, is apparently no nearer being achieved, which is generally regretted, Spalato being the calling port of that rich province, and the line unquestionably of the highest importance. The section of this projected railway appertaining to the Bosnian Treasury is nearly completed, and will be opened to the public in the course of a few months, but work on the section from Spalato to Arzanò dependent on the Austrian Treasury, and which it was arranged should be opened to traffic on January 1, 1895, has been suspended, no reason being given for this counter order.

The maritime authorities of Trieste have commenced since 1893 many works in the port of Spalato, such as quays, jetties,

Sardine
factories.

Falling-off in
sardine
fishing at
Zara and
Ragusa.
Trieste
Fisheries
Society.

Eel fishery in
the Narenta.

Public health
in Dalmatia.

Railways.

Works by
Marine
Board.

and lighthouses, and a scheme is on foot for the enlargement of the harbour at a cost of about 1,000,000 fl.; all these works are to be completed in connection with the abovementioned railway lines.

Vintage in
Dalmatia.

The vintage this year was a disastrous one owing to the peronospora which, from a partial, has become a general infliction. Partly owing to the ignorance of the people and partly to negligence, no measures of prevention were adopted to ward off the invasion, such as besprinkling the vines with sulphate of copper, &c. Therefore, whilst the quantity of wine produced a very satisfactory yield, namely 1,350,000 hectolitres, the quality turned out very inferior to the ordinary vintages.

Besides the peronospora another cause contributed to the deficient quality of the wine, namely the rainy damp summer which checked the maturity of the grapes. Then the price of wine underwent a decline owing to the recent reduction of the import duty on Italian wines mentioned in my last report. Thus the market price of good average wines has fallen from 10 fl. to 16 fl. per hectolitre to 6 fl. and 8 fl., causing a loss of 8,000,000 fl. to the province on this head alone.

Olives.

The olive crop this year was a meagre one, yielding about 100,000 quintals fetching on an average 30 fl. per quintal.

Insect flower
(chrysanthemum) and
rosemary.

The yield of flores chrysanthemum (insect flowers) and rosemary oil is yearly becoming less considerable.

Agricultural
return for
1892.

The following table shows the general yield in the various products of the soil in Dalmatia during the year 1892 (that of the year 1893 not having yet been compiled):—

TRIESTE

Produce.	Area.	Quantity.	Value in Austrian Florins.
	Hectares.	Quintals.	
Wheat	26,513	238,740	1,909,920
Brown wheat	2,082	17,360	95,480
Rye	4,752	45,130	315,910
Barley	21,411	175,210	1,051,260
Oats	3,398	14,970	89,820
Indian corn	49,406	536,860	2,845,358
Millet	5,480	34,400	205,800
Maize	1,473	8,500	34,000
Vegetables	2,876	14,200	99,400
Divers cereals	4,623	30,300	242,400
Straw	..	2,051,000	4,102,000
Tobacco	252	3,600	180,000
Chrysanthemum	2,120	29,070	1,511,640
Potatoes	3,196	108,280	324,840
Turnips	152	5,240	13,100
Grass	913	54,400	272,000
Clover	207	6,890	34,450
Hay	10,472	376,780	1,507,120
Wine	72,256	1,237,580	17,328,920
Figs	..	29,120	262,080
Chesnuts	53	300	2,400
Divers fruits	..	18,470	147,760
Nuts and almonds	..	6,960	382,800
Oil, olive	31,992	86,290	3,279,020
Mulberry leaves	503	32,750	131,000
Laurel leaves	20	1,460	10,220
Total	244,150	5,163,810	36,378,698

So that, reckoning the abovementioned produce of the soil at Poultry and 36,000,000 fl., and 4,000,000 fl. the value raised by poultry, silk- worms, a total of 40,000,000 fl. may be said to represent the year's results.

There are in Dalmatia 89,720 animals (cattle), horses, oxen, Cattle and and cows, and 1,041,346 smaller animals, viz., 824,191 sheep and horses. 217,155 goats. In the above are not included the cattle arriving in transit from Bosnia and Herzegovina.

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AND FINANCE.

AUSTRIA-HUNGARY.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF AUSTRIA-HUNGARY.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1265.

*Presented to both Houses of Parliament by Command of Her Majesty,
JUNE, 1894.*

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1894.

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AUSTRIA-HUNGARY.

VIENNA.

Consul-General von Schoeller to the Earl of Kimberley.

My Lord,

Vienna, May 1, 1894

I HAVE the honour to enclose a Report on the Commerce of Austria-Hungary for 1893, to which I have added some remarks on general matters, which I hope may be of interest.

I have, &c.

(Signed) PAUL VON SCHOELLER.

Report on the Trade and Commerce of Austria-Hungary for the Year 1893.

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Foreign trade. The results of the foreign trade of Austria-Hungary in 1893 clearly prove that a liberal policy in the way of the conclusion of trade conventions, does further the bartering exchange of goods.

This year was a favourable one for both exporters and importers, although the pending negotiations for trade conventions with Russia and Roumania—which countries are large buyers of industrial articles—were not concluded, still the trade balance showed a surplus of exports of more than 9,000,000*l.*, this being about 1,500,000*l.* more than in 1892. This is the more striking, as, in the said year, the imports also had increased, viz., by the considerable amount of 4,732,000*l.*

The value of the exports amounted to 66,600,000*l.*, being 6,298,000*l.* in excess of the figures of 1892, these are now the highest figures on record. The increase in question, however, is not due solely to the export of increased quantities. A rise in prices had occurred in the case of numerous important export articles and contributed to bring about this favourable result.

Chief articles affecting the exports. It may be noticed here that the following articles came mostly into question:—

Barley, oats, malt, fodder, beans, fruit, pigs, horses, eggs, sugar, spirits, margarine, fuel, minerals, yarns, textures, leather goods, china, matches, &c.

The single classes of goods participated in the total value of exports as follows:—

Classes.	Values in 1,000 <i>l.</i>		Increase.	
	1892.	1893.	Amount.	Per cent.
	£	£	£	
Cereals, cattle, and mill produce	13,698	15,569	1,871	13·6
Divers provisions.	8,273	10,268	1,995	24·1
Raw materials and manufactures of the textile branch	7,382	8,034	652	8·8
Metals, machines, and means of transport	2,328	2,365	37	1·6
Chemicals, grease, and oils	2,042	2,586	544	26·6
Divers auxiliary articles.	14,490	15,394	904	6·2
Divers manufactures	12,089	12,384	295	2·4
Total	60,302	66,600	6,298	10·5

Increase in metals, &c.

This statement shows that the classes, “metals, machines, and means of transport” and “divers manufactures” (latter including the most important articles of Austrian exports) only moderately participated in the increase. Some of the reasons were—the decrease of prices in the metal branch, and the unsettled financial state of some of the countries which always imported largely from Austria.

Taking into consideration these abnormal circumstances the Austrian export trade may yet be styled a surprisingly favourable one.

The quantities of Austrian exports imported by the most important countries, which buy in Austria, figured as follows:—

Countries.	Quantity.		Difference.	
	1892.	1893.	Amount.	Per cent.
	Tons.	Tons.	Tons.	
Germany	10,117,512	10,195,834	+ 78,322	+ 0·8
Italy	768,103	770,640	+ 2,537	+ 0·3
Switzerland	253,986	288,319	+ 34,333	+ 13·5
France	134,796	190,392	+ 55,596	+ 41·2
England	115,288	229,406	+ 114,118	+ 99·0
Russia	253,796	293,683	+ 39,887	+ 15·7
Roumania	247,846	282,472	+ 34,626	+ 14·0
Servia	86,808	89,929	+ 3,121	+ 3·6
Other countries ..	593,902	593,414	— 488	— 0·1
Total	12,572,037	12,934,089	+ 362,052	+ 2·5

From this list it will be seen that all specified countries increased their purchases, the largest, however, being the plus-purchases of England, which, in sugar alone, took 93,538 tons more. France likewise had a plus in staves of 19,800 tons, and in beans 8,778 tons. Great increase of English figures.

Taking the total, the increases in the quantities equalled 2·5 per cent.; in the values, however, 10·5 per cent., the latter being mostly due to the increased export of higher classes of goods.

This may also be seen from the subjoined list:—

Annex A.—RETURN of Principal Articles of Export during the Years 1892–93.

Articles.	Quantity.		
	1892.	1893.	Difference.
	Cwts.	Cwts.	Cwts.
Provisions—			
Corn	15,062,832	16,618,013	+ 1,555,181
Including—			
Barley	6,327,512	9,993,485	+ 3,665,973
Malt	2,384,462	2,670,540	+ 286,078
Oats	2,102,480	1,783,700	— 318,780
Wheat	1,464,157	1,486,019	+ 21,862
Maize	2,099,919	657,655	— 1,442,264
Rye	604,038	13,450	— 590,588
Dried vegetables	1,566,717	2,277,581	+ 710,863
Mill produce	910,847	831,450	— 79,397
Raw sugar	3,206,952	2,809,107	— 397,845
Refined sugar	4,494,040	6,032,807	+ 1,538,767
Beer	1,147,035	1,322,344	+ 175,309
Spirit	468,051	537,142	+ 69,091
Wine	496,473	464,099	— 32,374
Fruit	1,046,710	1,357,311	+ 310,601
Vegetables	1,973,048	1,235,651	— 737,397
Butter	100,299	107,204	+ 6,903
Eggs	1,272,854	1,293,339	+ 20,485
Poultry	136,581	144,901	+ 8,320
Common salt	196,795	149,782	— 47,013
Horned cattle .. (head)	73,597	48,237	— 25,360
Sheep (head)	202,002	226,988	+ 24,986
Pigs (head)	349,194	430,633	+ 81,439
Articles for manufacturing purposes—			
Brown coal	131,652,403	131,932,163	+ 279,765
Black coal	12,751,345	12,649,066	— 102,279
Cokes	1,711,675	2,118,041	+ 406,366
Timber	31,354,942	37,432,412	+ 6,077,470
Wool	112,394	134,166	+ 21,772
Pulp	630,444	689,539	+ 59,095
Ozokerite	125,703	90,709	— 34,994
Ceresine	72,372	73,623	+ 1,256
Margarine	140,488	148,344	+ 7,856
Hops	47,691	74,389	+ 26,698
Oil-seed	258,492	171,167	— 87,325
Minerals (divers)	13,898,062	15,437,670	+ 1,539,608
Chemical materials	551,482	614,629	+ 63,147
Manure	272,185	485,412	+ 213,227
Pig and broken iron	218,079	288,203	+ 70,124
Manufactures—			
Cotton yarns	32,386	44,394	+ 12,008
" goods	54,529	62,427	+ 7,898
Linen yarns	161,886	181,916	+ 20,030
" goods	47,403	48,136	+ 733
Woollen yarns	10,783	16,499	+ 5,716
" goods	81,035	93,951	+ 12,916
Silk goods	11,856	10,590	— 1,266
Garments and linen	37,941	41,726	+ 3,784
Leather	17,927	17,574	— 353
" goods	50,007	55,619	+ 5,612
Glassware	860,146	879,536	+ 19,390

RETURN of Principal Articles of Export during the Years
1892-93—continued.

Articles.	Quantity.		
	1892.	1893.	Difference.
	Cwts.	Cwts.	Cwts.
Manufactures—continued.			
Stoneware	720,663	716,752	— 3,911
Earthenware	769,280	867,293	+ 98,013
Iron goods	582,264	652,602	+ 70,334
Metal goods	62,848	67,665	+ 4,822
Wooden goods	61,448	58,522	— 2,926
Matches	138,245	160,407	+ 22,162
Chemical products ..	175,580	198,355	+ 22,775
Instruments	11,406	11,509	+ 103
Indiarubber goods ..	7,967	8,866	+ 899
Machines	156,510	171,203	+ 14,693
Paper	886,746	849,701	— 37,045
„ goods	65,260	69,766	+ 4,506

Eggs continue to be exported on a large scale, the export of Eggs, poultry, poultry is progressing, likewise the game trade, although the and game. exports of the said articles to Great Britain show a slight falling-off, probably attributable to the mild winter of 1893-94.

The bountiful hay harvest in Austria-Hungary promised rich Hay. returns for the growers here, especially as in Western Europe the great scarcity of rain in the spring and early summer had entirely ruined the crops there. British and French importers concluded here so many large engagements with sellers for delivery abroad during last summer and autumn, that the Imperial Royal Government was petitioned by many home parties interested, suggesting that the growers receive double and treble that which they themselves could possibly pay for hay for their cattle, and that all home products for consumption must necessarily suffer an important increase in price thereby. The Government, therefore, determined to prohibit the hay export, which edict remained for from 8 to 10 weeks in force.

Another competitor seems to have got a firm grip of this trade Salt to India. in the form of the Union Bank of Vienna, which has been despatching several cargoes of salt to India, chiefly to Calcutta. This had a doubly beneficial effect, for, besides being a new Austrian export article for India and lower in price than that from elsewhere, it has induced the Austrian Lloyds Steamship Company to hold regularly a monthly steamship service with Calcutta and Austro-Hungarian ports direct. It may, however, be stated that the only outward-going articles for Calcutta from Austria were scanty parcels of glassware, bent-wood furniture, paper, porcelain, lamps, beer, mineral waters, matches, &c. The hitherto existing expensive bi-monthly direct service to Colombo of this (1765)

company, and the employment of only one small steamer to and from Calcutta and Colombo, never sufficed for the outward bound freight from Calcutta. It, therefore, necessarily involved the chartering of extra freight room for the Adriatic ports—mostly of English steamers on their way home—by the Calcutta exporters themselves for their outward-bound Austro-Hungarian deliveries, which generally were composed of raw jute, hides, indigo, shellac, canes, linseed, &c. This also did away with the transferring of cargo from one steamer to another at different ports, which sometimes was repeated as often as three times in one voyage, particularly as some of the Lloyd's steamers (besides at Colombo before-mentioned) transfer direct cargo at Bombay and Aden to other direct steamers not working the Red Sea ports.

Bear.

Austria has long enjoyed an almost exclusive monopoly of the Egyptian and Syrian trade for this beverage. Regular shipments are now also made to India (Bombay) where the lighter Bohemian beers, chiefly from Pilsen, are becoming most popular. Especially small 50 litres casks have the preference, or cases containing from 24 bottles to 48 bottles.

Mineral waters.

The bulk of this trade to the British Eastern possessions is done by Austria, the annual increase in the consumption from this country is mainly due to the fact that Austria exports real and pure mineral waters taken from the different springs direct, and packed by a special contrivance to stand long sea voyages, whereas England is confined to sending out only artificially made mineral waters; preference is given, when possible, to the genuine waters, mostly from Carlsbad, Franzensbad, &c.

Agricultural machines in Russia.

Better class agricultural machines are sent from Austria-Hungary to Russia; there is a demand in Germany for only the cheaper kind. English agricultural machines of a very complicated sort are sent there direct.

Margarine.

In reviewing I would now venture to call the attention of parties interested to a few articles here on the development scale, viz., margarine and butter, especially as the decrease of the great Danish butter trade is interesting on all sides.

These Austrian products are capable of export, and may possibly rival the Australian and English butter trade. Certain it is, that the Austrian organisation show thorough progress this year and much in its favour. In 1893, a plus (over 1892) of 7,000 cwts. of butter left this country, and higher figures can also be shown in margarine, namely, over 8,000 cwts. more than the previous year's return of exports, most of which went eastwards, viz., to Turkey, Egypt, Syria, East Coast of Africa, even to Bombay and Ceylon.

This country being very rich in its agricultural products, there is plenty of capital forthcoming for these trades, so we are again likely to see still better figures next year.

Imports.

Whereas the total imports have exceeded last year's by 16 per cent., the value of the same has only increased by 9 per cent.

The excess is mostly attributable to the increased import of lower classed goods and a glance at the figures makes this assertion at once striking, for of the excess of 18,457,898 cwts., 10,958,838 cwts. alone belong to mineral-fuel, or a share equal to 58 per cent. Further to cereals, 2,038,518 cwts. or 11 per cent., whereas, the remainder is divided amongst such articles as vegetables, fruit, minerals, and other lower-classed goods. The commercial value of the total imports shows an increase of figures of 57,000,000*l.* against 52,000,000*l.* respectively for 1893 and 1892, and is divided amongst the following principal classes :—

Classes.	Values in 1,000 <i>l.</i>		Increase.	
	1892.	1893.	Amount.	Per cent.
	£	£	£	
Cereals and animals	4,276	5,226	950	22·2
Divers provisions. . . .	5,834	7,063	1,229	21·0
Raw materials, and manufactures of the textile branch	16,719	17,422	703	4·2
Metals, machines, and means of transport	3,977	4,323	346	8·8
Divers auxiliary articles. . .	9,837	10,667	830	8·4
Chemical, grease, and oils ..	3,308	3,448	140	4·2
Divers manufactures	8,249	8,785	536	6·5
Total	52,202	56,934	4,732	9·1

It is seen from this table, that articles of consumption especially showed increased figures. They are all included in the two first classes, and shared therein with a surplus of 2,175,000*l.* or equal to 43 per cent. Coffee alone figured in consequence of a considerable rise in prices with 600,000*l.*, cereals with 400,000*l.*, and Italian wines with 500,000*l.*, by reason of greater imports as shown in the subjoined list.

Of the textile class, cotton chiefly had an ad valorem increase. This article figures in the total values with a sum of 560,000*l.*

Here too, as with coffee, there was an increase in the price.

The increased imports of mineral coal resulted in an ad valorem increase of 340,000*l.*

Among other articles showing higher values through importation may still be mentioned raw tobacco, cigars, and nitrate of soda.

The quantities of the imports of the more important classes of goods were as follows :—

Annex B.—RETURN of Principal Articles of Import into
Austria-Hungary during the Years 1892–93.

Articles.	Quantity.		
	1892.	1893.	Difference.
Provisions—	Cwts.	Cwts.	Cwts.
Coffee	716,156	702,910	— 132,046
Southern fruits	1,413,040	1,520,715	+ 107,675
Spices	56,722	54,707	— 2,015
Tea	14,096	15,397	+ 1,301
Spirits	29,513	29,238	— 275
Wine	1,034,411	2,884,251	+ 1,349,840
Beer	118,560	122,311	+ 3,751
Eatables	358,608	448,432	+ 89,824
Rice	1,555,947	1,804,212	+ 248,265
Corn	1,985,264	4,024,298	+ 2,039,034
Including—			
Rye	141,308	133,963	— 7,345
Wheat	254,643	404,240	+ 149,592
Barley	89,674	468,616	+ 378,942
Oats	280,220	943,133	+ 662,963
Maize	1,059,607	1,460,940	+ 401,333
Millet	127,879	407,281	+ 279,402
Buckwheat	31,397	144,436	+ 113,039
Fish, shell fish	321,240	417,948	+ 96,708
Cheese	43,310	46,168	+ 2,848
Materials for manufacturing purposes—			
Cotton	2,107,707	2,139,868	+ 36,161
Wool	548,871	547,902	— 969
Including artificial wool ..	45,023	41,038	— 3,940
Silk	34,353	37,781	+ 3,228
Jute	347,433	633,126	+ 285,688
Flax	516,967	524,780	+ 7,813
Hemp	136,620	144,007	+ 7,387
Hides and skins	628,464	835,311	+ 206,847
Dyeing and tanning materials	923,870	815,401	— 108,469
Including acorn-cups ..	463,388	207,368	— 156,020
Gums and resins	712,168	704,679	— 7,489
Indiarubber	10,854	13,599	+ 2,745
Black coals	65,391,329	74,925,463	+ 9,534,134
Coke	4,954,881	6,044,582	+ 1,089,701
Divers minerals	7,888,375	8,326,531	+ 438,156
Iron	1,246,304	1,456,884	+ 210,580
Other metals (raw)	670,896	723,022	+ 52,126
Cement	495,716	716,009	+ 220,293
Mineral oils	2,926,779	3,195,805	+ 269,026
Turnery and carved materials	212,166	236,181	+ 24,015
Chemical materials	1,377,263	1,716,642	+ 339,379
Salt for industrial purposes ..	542,483	517,191	— 25,292
Paraffin	96,283	130,592	+ 34,304
Tallow (animal)	84,082	29,276	— 54,806
Palm oil	162,007	207,233	+ 45,226
Manufactures—			
Machines	654,153	691,576	+ 37,423
Articles made of—			
Iron	632,890	915,730	+ 282,840
Other metals	52,023	69,048	+ 17,020
Textile stuffs	570,685	544,024	— 26,661

RETURN²⁸ of Principal Articles of Import into Austria-Hungary
during the Years 1892-93—continued.

Articles.	Quantity.		
	1892.	1893.	Difference.
	Cwts.	Cwts.	Cwts.
Manufactures—continued.			
Including—			
Cotton yarns	222,453	196,779	— 25,674
Wool yarns	140,202	121,894	— 18,308
Jute yarns	67,595	79,385	+ 11,790
Wool goods	45,924	45,009	— 915
Paper	51,578	64,708	+ 13,130
Books, prints	81,941	94,591	+ 12,650
Chemical products	143,184	171,005	+ 27,821

In accordance with these figures, “the trade balance,” viz., ^{Trade balance.} the surplus of exports over the imports, amounted in 1893. to 9,680,000*l.* against 8,100,000*l.* in 1892, the improvement therefore is 1,580,000*l.* or 19 per cent. After comparing this result with those of the other leading European States, Austria-Hungary may well be satisfied.

Some attention was attracted here by the introduction of ^{Ceylon tea.} Ceylon tea for the first time into this country on a mercantile scale, and also by the establishment here of direct Ceylon agencies, and of houses in London possessing establishments in Ceylon. I have since heard that the rapid growth of this tea has, like all over Europe, found a very good footing here; the Ceylon merchants have encouraged this trade through a system of sending out consignments, and have not failed to create great interest in their teas here, if they have not at once quite seized the market. There is not the slightest doubt but that this class of tea has been received favourably, and that Ceylon will also find here one of her chief outlets and a growing market.

Amongst other imports it is interesting to note, that large ^{Sewing machines.} numbers of sewing machines continue to come from England. This trade has been proceeding already a couple of years and is flourishing.

Austria and Hungary form two of the most promising markets ^{Export to Australia.} for the extension of our trade abroad in leather, hides, goat-skins, whereas such ready-made articles as boots, shoes, &c., especially the “Victoria mark,” find a great output in Australia; although unlike the ready-made clothes trade, they continue to be sent to the antipodes via London. The latter business, on the other hand, now goes over the heads of London, as Australia now buys her clothes direct.

In connection with this matter, I may mention that ^{Tasmania.} Australia and Tasmania seem bent on the development of their industries at home, and attention should be paid to the progress these

countries are making, for this consulate has several times lately been called upon to procure information for Tasmanian capitalists desirous of establishing sugar mills there, all the circumstances regarding climate, soil, labour, water, &c., being as favourable there as in Bohemia, where the greatest sugar mills of the world are established.

Exhibition at Hobart. Tasmania has, I understand, established exhibition agencies both at Berlin and Vienna in connection with the forthcoming exhibition at Hobart. Here it may be interesting to note that application was made by Australia to take part in the International Exhibition of Food, &c., which was inaugurated here lately.

Plated goods. The electro-plate trade is partly effected by French and partly by English houses permanently here; Sheffield firms have not been encouraged to work largely here, although attempts were made as late as this winter to open up a first-class establishment of a London and Sheffield house in Vienna and Buda-Pesth. The fall in the value of silver makes every one here talk only of silver goods in future.

Cycles. Cycles were until now almost exclusively taken from English markets, the other competitors being 2 or 3 German factories. We have now several Austrian establishments and one large factory at Gratz, in Styria; the prices of the latter are, I hear, altogether about one-third less than what the English machines cost, including the heavy protective duties paid on entering Austria; still I know for a fact that preference is given to English machines, in spite of the higher prices, by reason of their most excellent workmanship.

Under false colours. One of the most unfair competitions under English guise is the stamping of Austrian made hats and other articles with the coat of arms of Great Britain.

Emigration from Austria. Austria's emigration was chiefly in the direction of South America or rather to Argentine, when already in 1878 about 900 immigrants had left for that country, the following year about 2,000, continuing annually until 1890 at the same rate of figures, with the only exception in 1888 when it reached 4,250. From 1887-90 about 23,000 had left Austria and arrived in Argentine.

Iron furniture. Iron bedsteads particularly are mostly manufactured in Vienna and Buda-Pesth, and compete with English makes in Bulgaria, Roumania, and Turkey in Europe. Wooden bedsteads are almost no more used, brass are sent nearly exclusively from England.

Wine exports and imports. Austria-Hungary's inland position and little seaboard explains why since years her export trade in wines is behind that of all other important wine-growing countries. To this may also be attributed one of the causes why we have to chronicle the deplorable fact that in 1893 this monarchy exported 32,386 cwts. less or only 464,074 cwts. against 496,460 cwts. in 1892, and imported just double the quantity of her previous year's imports, viz., 1,222,299 metrical cwts. against 530,266 metrical cwts., mostly Italian wines. In a word the imports were about five times as much as the

exports. The acidity of these natural home-grown wines seem unable to suit the foreigner's taste against the sweet and less fiery wines of Italy, France and Spain, where, particularly in the latter two countries, the wines are specially prepared for the market for which they are intended.

An important increase is noticeable in the Indian raw jute Raw jute. imports, but this is not attributable to an increased consumptive power of this country and was only caused by the fact that in the previous year the imports had been unusually low, the harvests having been bad and small as the ryots had sown more rice by reason of the higher price paid by exporters the previous year. There has been this year an improvement in prices paid for jute manufactures here, and this combined with lower prices asked generally in India for the raw article has induced buyers who last year had only bought from hand to mouth (previous stocks considered) to lay in larger quantities. Spinners even now have little or no stocks beyond their absolute requirements. Considering the depreciation of the rupee and greater purchasing powers of sterling values lately, the Austrian, Hungarian, and Bohemian spinners have done pretty well, on the whole, in their Indian purchases, and I may here mention that the dull state of trade in the manufactured article is, like all over the Continent, now at last picking up a little.

By reason of the high protective duties the import of Indian Sack trade from abroad. jute sacks is as impossible here almost as is the Dundee competition, although the former were at times not only cheaper in price, but also more suitable for some of the requirements of this market. In Egypt, Syria, Turkey, Bulgaria, and Roumania, Indian sacks compete as freely as the Dundee article does, in fact in the two first places it is almost exclusively in favour of Calcutta.

A syndicate has lately been formed in Vienna of the first Petroleum wells here and abroad. Austrian petroleum importers and the Anglo-Austrian Bank of Vienna and London. Austria imports most of her petroleum from Roumania and Russia, although attempts have been made to work the Transylvanian wells, they were hitherto so unsatisfactory in results, as to be almost a complete failure, chief reason being the lack of means of communication and transport to central markets. The requirements for petroleum here continues to be on the increase.

This city line, the concession of which was originally given Vienna town railway. to the "Steam Tramway Company" (Kraus) as stated in my report for 1892, is now to be constructed by the State, the Lower Austrian provincial authorities and the Vienna municipality unitedly. The physical position of the town is such as to have made the treatings unusually tedious and prolonged. It may be still fresh in the recollections of many, that a Glasgow engineer with Scotch capital some years ago obtained a concession from the Austrian Government to construct such a line under certain stringent regulations. The matter, however, ended disastrously in his deposit of 100,000*l.* being forfeited and confiscated by the State. The situation of Vienna, in a valley encircled on three

sides by undulating hills offers greater difficulties than was at first expected.

Foreign
insurance
companies.

These are cropping up here fast. Not only the larger American insurance companies, such as the "Mutual," the "New York," and the "Equitable" have established large offices here since some years, besides the English leading companies, viz., the "Gresham," the "North British," &c., and some leading Continental companies from France and Germany chiefly, but quite a number of smaller English and even Colonial offices are beginning to work here too.

Import of
precious
metals.

The import of gold was very considerable, which is, of course, attributable to the first steps taken by this Government to commence payments in gold.

The import of gold coins amounted to 5,600,000*l.*, and of gold in bars to 6,300,000*l.* Of these 228 cwts. of gold and gold coins came from Great Britain. In addition to this there were also imported 129 cwts. of silver bars from the same quarter.

Sanitary
condition of
cattle in
Austria.

It certainly will be worth noticing that through the energetic and stringent measures adopted by the Austrian Government, they have at last nearly succeeded in banishing infectious diseases from the country. The latest Government reports state that in the whole of Austria proper, about the middle of April last, there were only 176 farms, situated in 72 villages, infected, the cattle-plague being altogether excluded.

Advice to
English
subjects.

It has often been noticed at this consulate that British subjects when entering into contracts to give credit, especially to second-rate firms, for considerable amounts, also when engaging themselves, either in a pecuniary or other manner, to Austrian firms, do so without having first obtained such *bonâ fide* information as to whether the parties with whom they are contracting are in any way trustworthy. Only when it is too late do they write or otherwise apply to this Consulate, which then, of course, is not able to do much in the way of assistance.

It is evident that the parties in question who are engaging themselves would do well by first applying to H.M.'s Consulate, and acting then only upon such advice given, as the same is certainly only too willing to grant every assistance and furnish such information as may tend to prevent losses. Legal assistance, too, when necessary, can always be given by a legal gentleman of ability recommended by this consulate.

I might also add here that British merchants and exporters would do very well in their own interest to discontinue the practice of sending commercial travellers to Austria who are not conversant with the German language. The mere fact of this failing generally implies also an ignorance of German manners and systems which strike the uninitiated traveller, whereas one versed in all these qualities serves best the interests of both the buyer and seller. Such travellers will always be under a certain disadvantage, especially as a knowledge of English is not often found among Austrian commercial men.

Austria
abroad.

It is often asked why the Austrians, a thrifty, ingenious, and

industrious people, do not contribute more towards the world's consumption in the way of greater exports: Whether it be that the country being specially an agricultural one like Russia, or whether, through its inland position, the means of transit were not so favourable as in the present time, I cannot say; one thing, however, is now sure, viz., the people here are anxiously aware of some disadvantage laboured under against other countries in their exports, and strenuous efforts will be made henceforth to combine Austria's agricultural and exporting interests abroad.

As known already, the Austrians have erected some excellent semaphore stations on the Adriatic. These places were some years ago put in connection with Lloyd's, of London, and money deposited with each station to wire them at once news of any casualties occurring at sea in their neighbourhood.

Austrian
semaphore
stations.

In closing this report I may, perhaps, be justified in adding that the general "go-ahead" policy to which attention has been called, and which has shown such favourable results, augurs well for the future. On all sides in Austria a healthier tone prevails. There seems to be a sort of reaction here, an awakening to a fresh life after a deadened state of affairs.

Close.

The following tables show the quantities of goods imported and exported by Great Britain and her dependencies in 1893 to and from Austria-Hungary and vice versa.

Austria's
trade with
Great Britain
and her
dependencies.

The total value of these imports into Austria (exclusive of the traffic in precious metals) amounted to 10,070,526*l.*, whereas the value of the exports from Austria-Hungary were 6,147,616*l.*, showing a surplus in imports totalling 3,922,916*l.*

TABLE showing Articles Imported into Austria-Hungary from Great Britain and her Dependencies during the Year 1893.

Articles.		Quantity.
Colonial goods—		
Cocoanuts	Cwts.	4,906
Coffee	"	112,930
Tea	"	13,949
.. direct from China .. 13,035 }		
Spices—		
Pepper	"	23,368
Jamaica pepper	"	6,837
Ginger	"	2,323
Cinnamon	"	8,095
Cloves	"	1,264
Nutmeg	"	728
Cardamon	"	763
Vanilla	"	23
Southern fruits—		
Figs	"	189
Raisins	"	1,307
Dates	"	201
Almonds	"	298
Carob beans	"	148
Sugar—		
Sugar	"	72
Syrup	"	5,524
Starch, &c.	"	1,508
Tobacco—		
Raw	"	11,851
Cigars	"	29
Cereals, rice, &c.—		
Rice	"	1,496,920
Sundries	"	1,163
Fruits, &c.—		
Potatoes	"	16,218
Fruits	"	256
Vegetables	"	869
Rapeseed	"	219,698
Oilseed	"	42,009
Linseed	"	11,767
Castor seed	"	1,955
Sundry seed	"	10,546
Plants	"	5,936
Seaweed, &c.	"	2,253
Hops	"	700
Cattle—		
Bulls	Head	1
Cows	"	4
Sheep	"	11
Goats	"	6
Pigs	"	8
Horses	"	81
Animals—		
Poultry	Cwts.	3
Oysters	"	10
Sundry	"	248
Animal produce—		
Honey	"	271
Wax	"	158
Sponge	"	16
Hides and skins	"	101,618
Hair	"	310
Bed feathers	"	380

TABLE showing Articles Imported into Austria-Hungary from Great Britain and her Dependencies during the Year 1893—continued.

Articles.				Quantity.	
Animal produce—continued—					
Ostrich feathers	..	..	..	Cwts. ..	329
Other ..	..	..	..	..	114
Guts ..	..	..	..	..	1,170
Grease—					
Paraffin	..	..	..	..	27,987
Tallow..	..	..	..	..	6,508
Palm wax	..	..	..	..	23,214
Cocconut oil	..	..	..	..	45,655
Blubber	..	..	..	..	10,834
Chinese tallow	..	..	..	..	5,454
Sundries	..	..	..	..	7,571
Oils—					
Cotton-seed oil	..	..	..	..	60,918
Linseed oil	..	..	..	..	48,731
Sundries	..	..	..	..	1,693
Beverages—					
Beer ..	..	..	..	..	1,165
Spirits..	..	..	..	..	11,997
Wine ..	..	..	..	..	513
Sundries	..	..	..	..	19
Eatables—					
Arrowroot, &c.	..	..	..	..	761
Herrings	..	..	..	..	135,065
Other fish	..	..	..	..	6,451
Sundries	..	..	..	..	1,654
Fuel, coal, &c.—					
Timber	..	..	..	..	3,310
Coal ..	..	..	..	..	2,086,189
Turners' materials—					
Canes ..	..	..	..	..	4,727
Cocconuts and shells..	..	..	..	..	1,326
Horns ..	..	..	..	..	4,467
Amber, ivory, and tortoise-shells	..	..	..	..	189
Meerschaum ..	..	..	..	..	90
Mother-of-pearl, &c. ..	..	..	..	..	32,567
Minerals—					
Stones..	..	..	..	..	238
Ores ..	..	..	..	..	14,248
Plaster and clay	..	..	..	..	20,172
Graphite	..	..	..	..	845
Asbestos	..	..	..	..	2,594
Medicine, perfumery, oils—					
Galanga root ..	..	..	..	..	99
Ambra..	..	..	..	..	43
Oils ..	..	..	..	..	142
Opium	..	..	..	..	5
Sundries	..	..	..	..	31
Dye and tanning materials—					
Dyewood	..	..	..	..	39,596
Dye-stuff	..	..	..	..	67,599
Indigo..	..	..	..	..	11,086
Cochineal	..	..	..	..	150
Sundries	..	..	..	..	642
Gums and resins—					
Tar ..	..	..	..	..	729
Resin ..	..	..	..	..	4,990
Pitch ..	..	..	..	..	16,322
Bitumen	..	..	..	..	10,013

(1765)

B

TABLE showing Articles Imported into Austria-Hungary from Great Britain and her Dependencies during the Year 1893—continued.

Articles.		Quantity.
Gums and resins—continued—		
Oils	Cwts.	1,851
Gum tragacanth .. .. .	.. .. .	452
Copal, resin, &c. .. .. .	.. .. .	8,622
Indiarubber .. .. .	.. .. .	2,808
Aloe .. .. .	.. .. .	250
Sundries .. .. .	.. .. .	2,102
Mineral oils—		
Crude .. .. .	.. .. .	94
Refined .. .. .	.. .. .	4,656
Cotton, cotton yarns, and cotton goods—		
Raw cotton .. .. .	.. .. .	890,599
Cotton yarns .. .. .	.. .. .	123,174
„ goods .. .. .	.. .. .	6,490
Flax, hemp, and hemp goods—		
Flax and hemp .. .. .	.. .. .	7,378
Jute .. .. .	.. .. .	586,546
Fibres .. .. .	.. .. .	5,782
Yarns .. .. .	.. .. .	15,268
Linen goods .. .. .	.. .. .	1,428
Jute „ .. .. .	.. .. .	1,044
Ropes .. .. .	.. .. .	739
Wool, woollen goods, and yarns—		
Wool .. .. .	.. .. .	76,875
Woollen yarns .. .. .	.. .. .	44,896
„ goods .. .. .	.. .. .	14,897
Silk and silk yarns and goods—		
Silk and silk thread .. .. .	.. .. .	944
Goods and silk velvets, ribbons, &c. .. .. .	.. .. .	565
Garments, linen, and millinery—		
Flowers and feathers. . . . .	.. .. .	1
Hats .. .. .	.. .. .	57
„	Pieces	2,839
Garments	Cwts.	49
Linen .. .. .	.. .. .	269
Brooms and brushes—		
Brooms .. .. .	.. .. .	24
Brushes .. .. .	.. .. .	4
Canes and wickerwork—		
Canes .. .. .	.. .. .	1,492
Wickerwork .. .. .	.. .. .	4,089
Paper and paper goods—		
Pulp .. .. .	.. .. .	168
Paper .. .. .	.. .. .	989
„ goods .. .. .	.. .. .	788
Indiarubber and indiarubber goods—		
Indiarubber .. .. .	.. .. .	4,723
„ goods .. .. .	.. .. .	4,372
Leather cloth, oilcloth, &c.—		
Common .. .. .	.. .. .	234
Linoleum, &c. .. .. .	.. .. .	3,207
Oilcloth .. .. .	.. .. .	1,060
Calico for bookbinding .. .. .	.. .. .	859
Leather and leather goods—		
Leather .. .. .	.. .. .	41,742
„ goods .. .. .	.. .. .	2,054
Furs—		
Furs .. .. .	.. .. .	204
Fur coats .. .. .	.. .. .	14

TABLE showing Articles Imported into Austria-Hungary from Great Britain and her Dependencies during the Year 1893—continued

Articles.				Quantity.	
Wood and bone ware—					
Woodware	Cwts. ..	..	..	3,942	
Furniture	" ..	..	..	3,490	
Turner's and sundry goods	" ..	..	..	244	
Glass and glassware—					
Glass	" ..	..	..	991	
Glassware	" ..	..	..	275	
Stone goods—					
Roofing slate	" ..	..	..	186,337	
Sundry goods.. .. .	" ..	..	..	2,829	
Jewels	" ..	..	..	2	
Earthen goods—					
Bricks	" ..	..	..	13,231	
China and other goods	" ..	..	..	5,152	
Iron and iron goods—					
Pig-iron and cast-iron	" ..	..	..	964,245	
Wire	" ..	..	..	2,544	
Iron goods	" ..	..	..	33,677	
Arms	" ..	..	..	692	
Pens	" ..	..	..	1,145	
Needles, &c.	" ..	..	..	806	
Metal and metal goods—					
Metals	" ..	..	..	70,170	
Metal goods	" ..	..	..	2,292	
Wire	" ..	..	..	443	
Machines, &c.—					
Sewing machines	" ..	..	..	5,218	
Other	" ..	..	..	259,439	
Vehicles—					
Cycles	" ..	..	..	2,240	
Other vehicles	" ..	..	..	165	
Precious metals—					
Gold and gold coins	" ..	..	..	228	
Silver and silver	" ..	..	..	127	
Instruments, watches, &c.—					
Instruments	" ..	..	..	205	
Fancy goods	" ..	..	..	378	
Jewellery	" ..	..	..	29	
Watches	Pieces ..	..	..	1,364	
Umbrellas	Cwts. ..	..	..	2,277	
Salt					
Chemical substances	Cwts. ..	..	..	99,275	
" produce	" ..	..	..	10,183	
Soaps and candles—					
Candles	" ..	..	..	92	
Soap	" ..	..	..	525	
Matches	" ..	..	..	230	
Literary and art objects—					
Books	" ..	..	..	443	
Charts, music, &c.	" ..	..	..	22	
Manuscripts	" ..	..	..	19	
Paintings, &c.	" ..	..	..	152	
Refuse—					
Manure	" ..	..	..	50,236	
Refuse	" ..	..	..	696	
Rags	" ..	..	..	374	

TABLE showing Articles Exported from Austria-Hungary to Great Britain and her Dependencies during the Year 1893.

Articles.		Quantity.
Colonial goods—		
Coffee	Cwts.	8
Spices—		
Hungarian pepper (paprika) ..	”	19
Southern fruits—		
Lenons and oranges	”	121
Sundry fruits	”	142
Sugar—		
Sugar	”	3,217,943
Syrup	”	6
Tobacco—		
Raw	”	6,913
Cigars	”	8
Corn, flour, &c.—		
Millet	”	1,116
Barley	”	651,970
Wheat	”	21,052
Malt	”	6,047
Beans	”	127,301
Vetches and lupines	”	195
Flour	”	13,298
Fruits and vegetables—		
Fruits	”	3,564
Potatoes	”	195
Oilseed, hempseed, and other seed ..	”	3,425
Roseum	”	1,490
Plants	”	1,034
Hops	”	831
Cattle—		
Oxen	Head	481
Geldings	”	2
Sheep	”	214
Animals—		
Game	”	2,434
Poultry	”	3,123
Leeches, &c.	”	19
Animal produce—		
Eggs	Cwts.	144,310
Wax	”	406
Hides and skins	”	868
Hair	”	16
Feathers	”	487
Sundries	”	56
Grease—		
Butter	”	659
” surrogate	”	45
Lard	”	4
Ceresine	”	19,254
Tallow	”	97
Oil—		
Olive oil	”	382
Beverages—		
Beer	”	4,662
Spirits	”	177
Wine	”	2,323
Mineral water	”	2,632
Eatables—		
Bread and paste	”	158
Meat and sausages	”	153
Sundries	”	247

TABLE showing Articles Exported from Austria-Hungary to Great Britain and her Dependencies during the Year 1893—continued.

Articles.		Quantity.
Timber and woodenware—		
Timber	Cwts.	17,223
Staves	”	12,820
Shaving goods	”	18,302
Turner's materials—		
Canes	”	1,966
Shells, &c.	”	146
Minerals—		
Graphite	”	1,016
China clay	”	201
Other clay	”	12,114
Sundries	”	23
Medicines and perfumes	”	10
Dyeing and tanning materials—		
Dyewood	”	1,299
Tanning material	”	48,930
Sundries	”	363
Gums and resins—		
Ozokerite	”	507
Gummi gedda	”	622
Sundries	”	92
Mineral oil	”	..
Cotton goods—		
Cotton, raw	Cwts.	193
” yarns	”	839
” goods	”	4,135
Flax and hemp and hemp goods—		
Hemp	”	1,388
Other spinning material	”	220
Flax and hemp yarns	”	3,835
Linen goods	”	1,383
Jute goods	”	1,077
Strings	”	2,456
Wool and woollen goods—		
Raw wool	”	893
Shoddy	”	4,705
Woollen yarns	”	13
” goods	”	6,968
Silk and silk goods—		
Cocoons	”	105
Silk	”	112
” goods	”	1,729
Half silk goods	”	1,135
Garments, linen, and millinery—		
Artificial flowers	”	81
Feathers	”	9
Hats	”	306
”	Pieces	11,951
Millinery	Cwts.	202
Clothes	”	100
Linen	”	346
Sundries	”	49
Brushes and brooms	”	1,568
Straw goods	”	31
Paper and paper goods—		
Wood pulp	”	28,274
Common paper	”	1,584
Pasteboard	”	29,913

TABLE showing Articles Exported from Austria-Hungary to Great Britain and her Dependencies during the Year 1893—continued.

Articles.		Quantity.
Paper and paper goods—continued.		
Packing paper	Cwts.	37,126
Printing	"	1,108
Writing	"	58,604
Cigarette	"	10,183
Sundry paper and stationery	"	32,314
Playing cards	"	792
Indiarubber and indiarubber goods—		
Raw indiarubber	"	19
" goods	"	1,133
Oilcloth and linoleum	"	45
Leather and leather goods—		
Leather	"	347
" goods	"	560
Boots	"	5,234
Gloves	"	5,803
Furs and furriers wares	"	55
Wooden and bone wares—		
Common wooden wares	"	2,797
Furniture (bentwood)	"	11,880
" other	"	770
Turner's goods	"	7,224
Wooden	"	5,558
Wicker work	"	482
Parquetry	"	406
Toys	"	3,576
Buttons	"	164
Glass and glassware—		
Bottles	"	2,364
White glass	"	45,704
Plate	"	58
Buttons, &c.	"	4,076
Glassware	"	39,696
Stoneware—		
Common	"	64
Fine	"	2
Earthenware—		
Bricks and earthenware	"	4,487
China	"	3,817
Iron and ironware—		
Pig iron	"	700
Broken iron	"	250
Cast iron	"	3,143
Common iron goods	"	1,007
Nails	"	326
Sundry iron goods	"	1,883
Cutlery	"	115
Iron furniture	"	940
Metal and metal goods—		
Quicksilver	"	841
Zinc	"	62
Tin	"	39
German silver	"	591
" sheets and wire	"	229
Metal goods	"	21,144
Copper and nickel goods	"	65
Machines	"	1,163
Vehicles	Pieces	16

TABLE showing Articles Exported from Austria-Hungary to Great Britain and her Dependencies during the Year 1893—continued.

Articles.				Quantity.	
Precious metal—					
Silver coins, &c.	..	..	Cwts. ..	..	396
Instruments and watches—					
Scientific, &c.	..	..	" ..	..	217
Musical	..	..	" ..	..	687
Watches	..	..	Pieces	..	61
Clocks ..	..	..	" ..	..	174
Jewellery	..	..	" ..	..	60
Mother-of-pearl buttons	..	..	Cwts. ..	..	2,462
Toys, fans, nippers, &c.	..	..	" ..	..	6,308
Umbrellas	..	..	Pieces	..	7,032
Salt	..	..			..
Chemical substances—					
Sulphur	..	..	Cwts. ..	..	64
Cream of tartar	..	..	" ..	..	818
Wood acid	..	..	" ..	..	215
Potash ..	..	..	" ..	..	8,888
Alum ..	..	..	" ..	..	125
Glycerine	..	..	" ..	..	146
Naphthalene	..	..	" ..	..	135
White lead	..	..	" ..	..	378
Prussiate of potash	..	..	" ..	..	981
Chemical produce—					
Isinglass	..	..	" ..	..	37
Glue ..	..	..	" ..	..	14
Starch ..	..	..	" ..	..	1,365
Tartaric acid	..	..	" ..	..	611
Colours	..	..	" ..	..	343
Ink	..	..	" ..	..	293
Sundries	..	..	" ..	..	1,845
Chalk, &c.	..	..	" ..	..	1,016
Chloroform, &c.	..	..	" ..	..	264
Acetic acid	..	..	" ..	..	201
Varnish, &c.	..	..	" ..	..	15
Candles and soap	..	..	" ..	..	5,451
Matches ..	..	..	" ..	..	3,097
Books, &c.—					
Books and manuscripts, and music..	..	..	" ..	..	547
Paintings	..	..	" ..	..	1,001
Statues	..	..	" ..	..	86
Refuse—					
Rags, &c.	..	..	" ..	..	550

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AND FINANCE.

AUSTRIA-HUNGARY.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF FIUME.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1249.

*Presented to both Houses of Parliament by Command of Her Majesty,
JUNE, 1894.*

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AUSTRIA-HUNGARY.

FIUME.

Consul Faber to the Earl of Kimberley.

My Lord,

Fiume, May 22, 1894.

I HAVE the honour to enclose herewith the Annual Report for 1893 on the Trade and Commerce of Fiume, with 4 Annexes.

I have, &c.

(Signed) GEO. L. FABER.

Report on the Trade and Commerce of Fiume for the Year 1893.

ABSTRACT of Contents.

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Introductory.

It is necessary to preface this report by a few remarks on the trade returns (values) at this port. Unreliable character of official trade values.

The official valuations have not been revised for the last 10 years. The consequence is that they are, one may say, almost fictitious, and convey entirely erroneous impressions excepting by way of comparison. No account has been taken of the constant shrinkage of values which has been going on for the last decade,

(1787)

and thus a false position has been assumed, which may be compared with a steamer which has been run for a number of years without any appropriation of funds for the renewal of boilers. When at last the necessity becomes manifest, the profits, maybe of several years, are swallowed up. This is what must occur before long in the case of our trade values, and a reduction of 20 per cent. or 30 per cent. will have to be effected in a single year.

There is no doubt that there ought to be a standing commission of the Chamber of Commerce, whose duty it should be to revise these values from year to year.

This unsatisfactory state of things has rendered it necessary no longer to ignore the superficial character here described, and the matter is considered at length in the present report.

For comparison, 12 principal articles, both of import and export, are considered, representing about 80 per cent. of the total. Calculated on the official estimates, the necessary reduction amounts to one-third on flour, beans, and starch, 60 per cent. on sugar, 15 per cent. on oak staves, 75 per cent. on cellulose, and $3\frac{1}{2}$ per cent. on prunes. And in the case of imports a reduction of 44 per cent. on wine, 40 per cent. on British coal, 60 per cent. on native coal, 47 per cent. on phosphate of lime, 30 per cent. on dried fruit, 25 per cent. on iron manganese, 13 per cent. on olive oil, and 10 per cent. on jute. On the other hand, the estimates are too low in the case of barley (5 per cent. to 6 per cent.), oak extract ($33\frac{1}{2}$ per cent.), and on the following imports, viz.:—Naphtha oil (27 per cent.), Japanese rice (24 per cent.), and coffee (10 per cent.).

The following conclusions may be drawn, viz.: In the case of exports the net reduction is 1,279,000*l.* on goods valued at 4,350,000*l.*, being 29 per cent. And in the case of imports the reduction is 890,000*l.* on 4,090,000*l.*, being 22 per cent.

Applying these percentages to the total figures of imports and exports, we find the exports reduced by 1,650,000*l.* to 4,044,000*l.*, and the imports reduced by 1,070,000*l.* to 3,830,000*l.*

The total trade values would therefore be somewhat under 8,000,000*l.*, instead of 10,600,000*l.* (the official figures), and this will probably be the case.

Particulars will be found in Annex D.

Increase of
trade.

There is a large increase of trade all round (+ 38 per cent. in weight and + 37 per cent. in value), and more especially of imports (+ 40 per cent. in weight and + 42 per cent. in value).

Exports have gained 38 per cent. in weight and 33 per cent. in value.

Increase of
wine imports.

Wine has become the most important article of commerce, flour having hitherto occupied the leading position. The increment to Italian trade is due to this article, and thus Italy has gained the second rank in the total, as also in the foreign trade.

The articles next in importance to wine are flour, oak-staves, sugar, rice, petroleum, barley, jute, beans, tobacco, oak timber, coffee, cotton yarn, &c.

The aggregate loss in weight of trade in 1892 (137,000 tons) has been made good in 1893 by an increase of 275,000 tons.

Aggregate shipping has increased by 350,000 tons (entered and cleared), or $21\frac{1}{2}$ per cent. Increase of shipping.

British shipping has increased by 16 steamers and 41,000 tons, the values of cargoes carried under the British flag having risen 500,000*l.* or 20 per cent.; but British shipping continues to be adversely affected by the increasing competition of Hungarian shipping, the influences of which will become more apparent in 1894. British shipping.

The share of British trade and shipping at this port amounts to 27 per cent. (a decrease of $3\frac{1}{2}$ per cent.) of the steam tonnage; to 24 per cent. (a decrease of $2\frac{1}{2}$ per cent.) of the aggregate tonnage; to $32\frac{1}{2}$ per cent. (a decrease of $2\frac{2}{3}$ per cent.) of the foreign trade; and to $26\frac{1}{2}$ per cent. (unaltered) of the total trade. Share of British trade and shipping.

The value of the British shipping trade (cargoes under the British flag), which in 1892 was $33\frac{1}{2}$ per cent., has gone back to 29 per cent. of the entire trade, which is a loss of $4\frac{1}{2}$ per cent. Four years ago half the shipping trade was British, though the loss is not so great as might be thought, being roughly 700,000*l.*, the other countries, especially Austria-Hungary, having gone ahead to our detriment.

Comparing the values of trade, Great Britain ranks first (26 per cent.), Italy second (24 per cent.), Austria-Hungary third (19 per cent.), France fourth (13 per cent.), and next in order Russia (4 per cent.), United States ($3\frac{3}{4}$ per cent.), Turkey, and Brazil. Total trade.

Comparing the values of foreign trade (to the exclusion of Austria-Hungary), the order is as follows:—Great Britain, $32\frac{1}{2}$ per cent.; Italy, 30 per cent.; France, $16\frac{1}{3}$ per cent.; Russia, $4\frac{1}{4}$ per cent.; United States, $4\frac{3}{8}$ per cent.; Turkey and Brazil each nearly 3 per cent.; and next in order Holland, Belgium, Japan, Spain, Germany, Egypt, and Greece. Foreign trade.

As regards the shipping trade (values of cargoes), the figures are: Austria-Hungary, 57 per cent.; Great Britain, 29 per cent.; Italy, 11 per cent.; and sundries, 2 per cent. Shipping trade. (carrying)

Shipping.

The shipping entered and cleared was as follows :—

	Entered.		Cleared.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.
With cargoes	4,796	693,812	4,437	773,923
In ballast	1,491	292,846	1,819	208,490
Total, 1893	6,287	986,658	6,256	982,413
„ 1892	6,223	810,204	6,287	807,723
Increase	64	176,454	..	174,690

showing an increase of $21\frac{1}{2}$ per cent., and also an increase in the average tonnage per craft, viz. :—

Year.						Quantity.
						Tons.
1890.. ..	..	..	..	..	..	161
1892.. ..	..	..	..	..	..	128
1893.. ..	..	..	..	..	..	157

thus showing a larger proportion of sea-going vessels.

The proportion of steamers to sailing vessels was as follows :—

CLEARED.						
Year.		Steam.		Sailing.		
		Number of Vessels.	Tons.	Number of Vessels.	Tons.	
1893	..	3,910	870,345	2,546	112,068	
1892	..	3,838	695,600	2,399	112,123	

this being an increase of 25 per cent. in the tonnage of steamers, sailing vessels showing no change.

The average tonnage per craft has risen from 180 tons to 223 tons for steamers.

The percentage of steamers as compared with sailing vessels is as follows :—

Year.					Number of Vessels.	Tons.
					Per cent.	Per cent.
1886	..	..	..	..	$45\frac{1}{2}$	$76\frac{9}{10}$
1891	..	..	..	..	$57\frac{7}{10}$	84
1892	..	..	..	..	$61\frac{1}{2}$	$86\frac{1}{10}$
1893	..	..	..	..	$62\frac{1}{2}$	$88\frac{3}{5}$

FLAGS of Shipping.

STEAMERS CLEARED.

Country.	Number of Vessels.	Tons.
Austria-Hungary	3,591	560,668
Great Britain	169	236,863
Italy	120	50,017
Norway	14	9,633
Germany	9	7,072
Sundries	7	6,092
Total, 1893	3,910	870,345
„ 1892	3,888	695,600

The percentage of the tonnage of steamers being as follows :—

Country.	Percentage.		
	1891.	1892.	1893.
Austria-Hungary	62·15	62·65	64·44
Great Britain	34·83	30·77	27·23
Italy	..*	..*	5·75
Sundries	3·02	6·58	2·58

* Not specified.

The Italian flag has increased by 68 steamers and 25,000 tons; the British flag by nine steamers of 23,000 tons; and the Austro-Hungarian flag has 56 less steamers, but an increase of 125,000 tons. The relative percentage being an increase of $2\frac{1}{4}$ per cent. in the case of Italy; of 2 per cent. in the case of Austria-Hungary; and a decrease of $3\frac{1}{2}$ per cent. in the case of Great Britain.

Since 1890 the percentage of the share of Great Britain in the steam tonnage has fallen just 10 per cent., the actual decrease during that period being 60 steamers of 42,000 tons.

The tonnage per craft of British steamers has increased from 1,338 tons in 1892, to 1,400 tons in 1893; that of Austria-Hungary from 120 tons in 1892, to 160 tons in 1893—what it was in 1891.

Sailing vessels show practically no alteration.

AUSTRIA-HUNGARY.

SAILING VESSELS CLEARED.

Country.	Number of Vessels.	Tons.
Austria-Hungary	1,444	61,446
Italy	878	46,156
Sundries	24	4,466
Total, 1893	2,346	112,068
„ 1892	2,399	112,123

The percentage of the tonnage of sailing vessels, according to flags, is as follows, viz. :—

Country.	Percentage.		
	1891.	1892.	1893.
Austria-Hungary	63·87	55·82	54·87
Italy	28·87	36·17	41·21
Sundries.. .. .	7·26	8·01	3·92

thus showing an increase only in the case of Italy.

Aggregate
tonnage.

The percentage of the aggregate tonnage of steamers and sailing vessels, according to flag, is as follows :—

Country.	Percentage.		
	1891.	1892.	1893.
Austria-Hungary	62·42	61·70	63·85
Great Britain	29·30	26·84	24·16
Italy	5·23	8·05	9·80
Sundries	3·05	3·41	2·69

the change being unsatisfactory for the British flag.

Austro-
Hungarian
carrying
trade.

As regards the Austro-Hungarian shipping trade, the following table specifies the values of cargoes imported and exported from and to foreign countries and coastwise :—

IMPORTS under the Austro-Hungarian Flag.

Country.	Value.
	£
Austria (coasting)	1,182,500
Hungary "	41,500
Italy	855,000
Great Britain	275,000
Russia	267,000
Turkey	85,000
Brazil	75,000
France	35,000
Spain	23,000
Sundries	56,000
Total	2,895,000
" 1892	2,050,000

EXPORTS under the Austro-Hungarian Flag.

Country.	Value.
	£
Austria (coasting)	575,000
Hungary "	215,000
France	800,000
Italy	600,000
Great Britain	524,000
Brazil	167,000
Turkey	153,000
Spain	83,000
Sundries	113,000
Total	3,180,000
" 1892	2,350,000

In the same way the following tables show the results of the Italian shipping trade:—

IMPORTS under the Italian Flag.

Country.	Value.
	£
Italy	720,000
Sundries	19,000
Total	739,000
" 1892	236,000

EXPORTS under the Italian Flag.

Country.						Value.
						£
Italy	..	..	..	..	..	340,000
France	..	..	..	..	..	97,000
Sundries	..	..	..	..	..	22,000
Total	..	..	..	..	..	459,000
„ 1892	..	..	..	..	..	281,000

The shipping trade of other countries (excepting British, which is given separately) is so small as not to need being specified.

The following table recapitulates the values of cargoes shipped under the various flags:—

Recapitulation of carrying trade.

IMPORTS.

Under Flag of—						Value.
						£
Austria-Hungary	..	..	..	..	..	2,895,000
Great Britain	..	..	..	..	..	1,200,000
Italy	..	..	..	..	..	739,000
Sundries	..	..	..	..	..	68,000
Total	..	..	..	..	..	4,902,000
„ 1892	..	..	..	..	..	3,463,000

EXPORTS.

Under Flag of—						Value.
						£
Austria-Hungary	..	..	..	..	..	3,180,000
Great Britain	..	..	..	..	..	1,887,000
Italy	..	..	..	..	..	459,000
Sundries	..	..	..	..	..	168,000
Total	..	..	..	..	..	5,694,000
„ 1892	..	..	..	..	..	4,266,000

The shipping trade of Austria-Hungary has increased 38 per cent. in value; that of Great Britain 20 per cent.; and that of Italy 131 per cent.

The share taken by each country (according to the values of cargoes) being as follows:—

Carrying trade; shares of each country.

Under Flag of—				Percentage.	
				1892.	1893.
Austria-Hungary	..	..	..	56·93	57·33
Great Britain	..	..	..	33·50	29·14
Italy	..	..	..	6·69	11·30
Sundries	..	..	..	2·88	2·23

British Shipping.

The share taken by British shipping is as follows :—

				Number of Vessels.	Tons.	Value of Cargoes.
Entered	..	..	..	172	289,431	£ 1,200,426
Cleared	..	..	..	171	237,249	1,886,616
Total, 1893	..	..	..	343	476,680	3,087,042
„ 1892	..	..	..	327	435,649	2,583,310
„ 1891	..	..	..	447	542,061	3,231,853

The number of vessels has increased by 16 and the tonnage by 41,000 tons.

Exchanges are calculated at the uniform rate of 12 fl. per 1*l*. Exchanges.

The increase in the value of cargoes under the British flag is just 500,000*l*. or 20 per cent.; it still falls short, however, of the years 1890–91.

The direct trade with Great Britain (including East Indies) Direct trade.
under the British flag comprise :—

VESSELS ENTERED WITH CARGOES.

Year.				Number of Vessels.	Tons.	Value of Cargoes.
1893	..	..	..	100	132,435	£ 885,793
1892	..	..	..	93	118,480	738,602
1890	..	..	..	98	125,474	750,293
1888	..	..	..	94	119,694	476,026

this is an increase of 20 per cent.

AUSTRIA-HUNGARY.

VESSELS CLEARED WITH CARGOES.

Year.	Number of Vessels.	Tons.	Value of Cargoes.
			£
1893	84	105,976	1,085,012
1892	80	98,243	857,397
1891	95	114,212	1,094,247
1889	118	145,681	1,678,946
1888	126	154,604	1,938,402
1884	123	143,469	1,081,866

thus regaining the ground lost in 1892, but leaving the values at but little more than half what they were in 1888.

AGGREGATE Direct Trade under British Flag.

Year.	Value.	
	Currency.	Sterling.
	Florins.	£
1887	20,813,674	1,638,872
1890	27,006,023	2,332,225
1891	20,938,684	1,774,464
1892	19,151,993	1,595,999
1893	23,649,798	1,970,810

this shows an increase of 375,000*l.* or 24 per cent.

The indirect, or carrying trade under the British flag was as follows :—

British
indirect
(carrying)
trade.

VESSELS ENTERED WITH CARGOES.

Year.	Number of Vessels.	Tons.	Value of Cargoes.
			£
1893	20	27,769	314,628
1892	32	46,007	348,133
1889	38	45,847	432,558
1887	24	25,440	206,577

a decrease of 10 per cent.

The following table specifies the countries of origin :—

Country.	Value.	
	1892.	1893.
	£	£
Russia	269,020	187,044
Japan	31,157	72,886
United States	26,814	84,745
Sundries	21,142	19,953
Total	348,133	314,628

Less naphtha oil was carried from the Black Sea in British ships, there being an Austro-Hungarian tank-steamer carrying on a regular service for the local refinery here. This alone accounts for a difference of 130,000*l*.

On the other hand, there is an increase on petroleum imported from the States (+ 58,000*l*.) and on Japan rice (+ 42,000*l*.).

VESSELS CLEARED WITH CARGOES.

Year.	Number of Vessels.	Tons.	Value of Cargoes.
			£
1893	56	87,611	801,604
1892	45	66,945	644,178
1891	83	98,719	1,067,092
1888	91	98,955	1,126,362

an increase of 24 per cent.

The following table specifies the countries of destination :—

Country.	Value.	
	1892.	1893.
	£	£
France	233,974	378,966
United States	307,778	269,494
Netherlands	58,490	86,289
Belgium	22,047	25,510
Italy	..	38,145
Sundries	21,889	3,200
Total	644,178	801,604

Here, the competition of the “Adria” boats is felt, more especially in the carrying-trade with France, two-thirds of this trade being carried under the Austro-Hungarian flag, and only one-third under the British flag.

TABLE showing the Aggregate Value of the British Carrying Trade at the Port of Fiume.

Year.						Value.
						£
1893..	..	..	..	..	..	1,116,232
1892..	..	..	..	..	..	992,311
1891..	..	..	..	..	..	1,457,889
1888..	..	..	..	..	..	1,472,921
1885..	..	..	..	..	..	734,209
1882..	..	..	..	..	..	185,640

an increase of 12 per cent. for the year.

TABLE showing the Total Trade (Direct and Indirect) under the British Flag at the Port of Fiume.

Year.						Value.
						£
1893..	..	..	..	..	..	3,087,042
1892..	..	..	..	..	..	2,588,310
1891..	..	..	..	..	..	3,231,853
1890..	..	..	..	..	..	3,701,836
1888..	..	..	..	..	..	3,887,349
1884..	..	..	..	..	..	2,327,062

Decrease of
share of
British
shipping
trade.

The share of British shipping in the total maritime trade (including Austria-Hungary) at this port, according to the value of cargoes, is shown by the following percentage :—

Year.						Per Cent.
1893..	..	..	..	..	..	29 $\frac{1}{5}$
1892..	..	..	..	..	..	33 $\frac{1}{2}$
1891..	..	..	..	..	..	40 $\frac{3}{5}$
1890..	..	..	..	..	..	48 $\frac{3}{5}$
1889..	..	..	..	..	..	50 $\frac{3}{5}$
1888..	..	..	..	..	..	51 $\frac{2}{5}$
1886..	..	..	..	..	..	45 $\frac{1}{2}$

In other words, the share of the British shipping trade has been on a constant decrease since 1888, when it was over one-half, it being now barely three-tenths of the total value of cargoes.

The following tables further exemplify this fact :—

RETURN of British Trade at the Port of Fiume during the
Years 1890-93.

Year.					Under the British Flag.	Under other (than British) Flags.
					£	£
1890	..	..	..	..	2,382,225	294,620
1891	..	..	..	..	1,774,464	272,976
1892	..	..	..	..	1,595,999	448,157
1893	..	..	..	..	1,970,810	818,591

The percentage of foreign flags, as compared with the British flag, has therefore risen as follows :—

Year.					Per Cent.
1890..	..	..	..	..	11·2
1891..	..	..	..	..	13·3
1892..	..	..	..	..	21·9
1893..	..	..	..	..	29·2

The British trade carried by other flags than the British flag was carried almost exclusively in Austro-Hungarian vessels, viz.:—

IMPORTS.

From—					Value.
					£
United Kingdom	..	..	..	..	162,000
East Indies	..	..	..	..	112,000
Malta	..	..	..	..	1,000
Total	..	..	..	..	275,000

EXPORTS.

To—					Value.
					£
United Kingdom	..	..	..	..	489,000
Gibraltar	..	..	..	..	20,000
Malta	..	..	..	..	13,000
East Indies	..	..	..	..	3,000
Total	..	..	..	..	525,000

A comparison of the total shipping trade (values of cargoes) at the port of Fiume gives the following results, viz :—

Year.	Value in 1,000l.		
	British Shipping.	Other than British Shipping.	
		Coasting.	Ocean-going.
1887	2,706	1,236	1,977
1888	3,887	1,489	2,159
1889	3,711	1,515	2,149
1890	3,702	1,689	2,258
1891	3,232	1,992	2,683
1892	2,588	1,981	3,160
1893	3,087	2,033	5,475

The increase of the ocean-going (not British) is most apparent in the last 2 years; most of this is due to the Italian wine traffic, which in a measure is far-coasting trade; this amounted to 1,373,000l. in 1892, and has risen to 2,524,000l. in 1893, thus accounting for an increase of 1,150,000l. out of 2,315,000l., or nearly one-half.

If we deduct the Italian trade from the ocean-going, we arrive at the following figures :—

Year.	Value.
	£
1892.. .. .	1,787,000
1893.. .. .	2,951,000

as representing the actual (not British) ocean-going shipping, as against the following figures :—

Year.	Value.
	£
1892.. .. .	2,588,000
1893.. .. .	3,087,000

which represent the British shipping trade.

This would show that the ocean-going shipping trade is about equally divided between the British and the non-British flags; though on the other hand the non-British has gained 65 per cent. since the year 1892, whereas the British has gained only 20 per cent. during the same period.

Trade and Commerce.

The imports and exports by sea amounted to :—

					Quantity.	Value.
					Tons.	£
Imports	..	..	..	..	422,644	4,901,608
Exports	..	..	..	..	567,163	5,693,665
Total, 1893	..	..	..	..	989,807	10,595,273
„ 1892	..	..	..	..	713,875	7,728,734
Increase	..	..	..	..	275,932 (or 38 %)	2,866,539 (or 37 %)

Imports.

Imports have gained 120,000 tons. or about 40 per cent. in weight, and 1,440,000*l.*, or 42 per cent. in value.

Imports under the British flag were 1,200,426*l.*, an increase of 114,000*l.*, or 10½ per cent. Under the British flag.

Imports from the United Kingdom were 424,205*l.*, a decrease of 17,000*l.*, or 4 per cent. From United Kingdom.

Imports from British India (rice and jute) were 741,179*l.*, an increase of 264,000*l.*, or 55 per cent. From India.

The principal imports are given in the following list (the figures are approximate) :—

PRINCIPAL IMPORTS.

Articles.		Quantity.	Increase or Decrease.
Petroleum	Metrical tons	84,000	+ 20,000
Rice	„	52,000	+ 15,000
Coal	„	57,000	+ 11,000
Wine	Hectolitres ..	990,000	+ 35,000
Jute	Metrical tons	14,500	+ 7,500
Chemicals	„	2,650	+ 1,450
Phosphate of lime	„	5,800	..
Iron manganese	„	4,000	..
Santorin earth	„	3,400	..
China clay	„	1,250	..
Salt	„	6,200	..
Iron and steel	„	3,600	+ 2,200
Pig-iron	„	700	..
Hardware	„	1,400	— 200
Metals	„	900	— 1,000
Tobacco	„	2,400	..
Maize	„	2,000	+ 1,700
Cotton goods and yarn	„	1,400	— 200
Coffee	„	1,900	+ 300
Oils	„	2,500	+ 1,200
Fruit, dried	„	5,300	+ 4,300
„ fresh	„	1,400	+ 200
Resin	„	3,200	+ 1,500
Tanning goods	„	2,000	+ 1,000
Leather	„	1,050	+ 200

NOTE.—The metrical ton (1,000 kilos.) is equal to 2,204 lbs., *i.e.*, about 1½ per cent. lighter than the English ton. The above articles represent (in weight) five-sixths of all imports.

(1787)

B

TABLE showing Imports from Great Britain of Articles above
100*l.* in Value.

Articles.					Value.
					£
Cotton yarn	..	..	..	..	116,000
„ goods	..	..	..	..	11,000
„ raw	..	..	..	..	1,700
Hemp	..	..	..	..	1,600
Woollen goods	..	..	..	..	200
Felt	..	..	..	..	730
Jute goods	..	..	..	..	640
„ woven	..	..	..	..	1,000
„ raw	..	..	..	..	430
Soda	..	..	..	..	1,840
Caustic soda	..	..	..	..	3,500
Sulphate of soda	..	..	..	..	100
„ copper	..	..	..	..	2,000
„ iron	..	..	..	..	400
Potash	..	..	..	..	600
Saltpetre	..	..	..	..	420
Sal ammoniac	..	..	..	..	100
Chlorate of lime	..	..	..	..	200
Acid, ferric	..	..	..	..	6,620
„ oxalic	..	..	..	..	750
Manganese	..	..	..	..	120
Oil, linseed	..	..	..	..	4,500
„ cotton	..	..	..	..	6,400
„ lubricating	..	..	..	..	500
„ palm	..	..	..	..	920
„ aniline	..	..	..	..	300
Iron, pig	..	..	..	..	13,000
„ bars and rods	..	..	..	..	150
„ pipes	..	..	..	..	460
„ phosphate of	..	..	..	..	31,000
Hardware	..	..	..	..	3,900
Machinery	..	..	..	..	9,000
Tin	..	..	..	..	13,000
Tin-plates	..	..	..	..	1,740
Sewing machines	..	..	..	..	9,600
Yellow metal	..	..	..	..	500
Copper, raw	..	..	..	..	1,150
Chains and anchors	..	..	..	..	3,750
White lead	..	..	..	..	2,350
Zinc, manufactured	..	..	..	..	150
Minerals, metallic	..	..	..	..	1,800
Minium	..	..	..	..	200
Sail-cloth	..	..	..	..	2,000
Manila rope	..	..	..	..	300
Pitch, tar	..	..	..	..	200
Varnish	..	..	..	..	400
Coal	..	..	..	..	63,500
Rum	..	..	..	..	600
Lard	..	..	..	..	1,200
Codfish	..	..	..	..	1,800
Salt meat	..	..	..	..	2,100
Tea	..	..	..	..	100
Coffee	..	..	..	..	2,000
Rice	..	..	..	..	500
Wax, mineral	..	..	..	..	19,000
„ animal	..	..	..	..	1,200
Stearine	..	..	..	..	1,660
„ candles	..	..	..	..	875
China clay	..	..	..	..	1,760

TABLE showing Imports from Great Britain of Articles above 100*l.* in Value—continued.

Articles.	Value.
	£
Leather	10,000
Tobacco (American)	48,500
Hides, dried	2,400
Wood (not European)	500
„ manufactured	375
Smoke-black	460
Slate	5,250
Vegetable hair	300
Seeds, undenominated	1,500
Porcelain	100

IMPORTS FROM THE EAST INDIES.

Articles.	Value.
	£
Rice.. .. .	487,000
Jute	241,000
Pepper	6,500
Coffee	1,000

IMPORTS FROM MALTA.

Articles.	Value.
	£
Sail-cloth	375
Porcelain	200
Potatoes	135
Wine (bottled)	100

WINE IMPORTS.

Country.	Quantity.		Value.	
	1892.	1893.	1892.	1893.
	Hectolitres.	Hectolitres.	£	£
Dalmatia	342,000	338,000	713,400	703,500
Italy	292,000	649,000	608,000	1,350,000
Greece	4,000	3,000	9,650	6,500
Total	638,000	990,000	1,331,050	2,060,000

The official values are exaggerated here as in many other instances.

The following amounts are calculated at outside rates, viz. :—
(1787) B 2

					Value.
					£
Italian imports	..	..	..	..	810,000
Dalmatian imports..	..	..	..	..	340,000
Greek imports	..	..	..	..	4,000
Total	..	..	..	..	1,154,000

This would reduce the sum total of imports from Italy by 540,000*l.*, and from Dalmatia by 360,000*l.*

Allusion will have to be made to this subject at several stages of the present report (see introduction at page 1).

IMPORTS.

Articles.	From—	Quantity.	Value.
		Met. tons.	£
Naphtha oil	Russia	71,500	357,500
	United States	9,400	47,000
Refined oil	Russia	3,000	30,000
Rice	Burmah	45,000	487,000
	Japan	6,700	72,600
Tobacco.. ..	Turkey	1,875	200,000
	America	362	48,000
Coal	England	38,000	63,400
	Austria	17,500	29,200
Coffee	Trieste	717	53,800
	Egypt	45	3,370
	Germany	106	7,950
	Brazil	990	74,250
Iron manganese ..	England	427	1,770
	America	1,375	5,730
	Spain.. ..	2,047	8,630
Phosphate of iron ..	England	2,500	31,250
	America	3,000	37,500
	Spain.. ..	310	3,875

The official values are over-estimated in the case of British coal by 40 per cent., native coal by 60 per cent., iron manganese by 25 per cent., phosphate of lime by 47 per cent., jute by 10 per cent., olive oil by 13 per cent., and dried fruit by 30 per cent.

On the other hand the official estimates of naphtha oil should be increased 27 per cent.; Japanese rice, 24 per cent.; and coffee, 10 per cent.

Burmese rice, refined petroleum, tobacco, and cotton yarn remain unaltered.

For particulars see Annex D.

Exports.

Exports have gained 156,000 tons, or 38 per cent. in weight, Increase.
and 1,428,000L., or 33 per cent. in value.

Exports under the British flag amount to 1,886,616L., viz., an Under British
increase of 385,000L., or 25½ per cent. in value. flag.

Exports to the United Kingdom and colonies amount to To the United
1,619,017L., viz., an increase of 493,000L., or 43½ per cent. in Kingdom.
value.

The following table shows the prominent changes in the Principal
principal articles of export; the figures are approximate:— exports.

PRINCIPAL EXPORTS.

Articles.		Quantity.	Increase or Decrease.
Flour	Metrical tons..	92,000	+ 24,000
Barley	" ..	47,000	+ 28,000
Wheat	" ..	6,200	..
Maize	" ..	9,000	— 16,000
Beans	" ..	31,000	+ 10,000
Rice	" ..	7,500	+ 3,500
Bran	" ..	2,800	— 400
Prunes	" ..	2,100	— 3,400
Sugar	" ..	35,500	+ 18,000
Wine	" ..	1,800	+ 200
Mineral waters	" ..	3,300	— 400
Paper	" ..	1,300	— 100
Cellulose	" ..	3,400	+ 1,300
Chemicals	" ..	2,300	+ 300
Oak extract	" ..	11,000	+ 2,000
Minerals	" ..	700	— 2,800
Spirits	" ..	3,200	+ 800
Rice starch	" ..	1,050	..
Glue and gelatine	" ..	200	..
Seeds	" ..	1,000	+ 300
Petroleum	" ..	2,200	+ 600
Oak staves	Number ..	53,000,000	+ 20,000,000
Various lumber	" ..	10,000,000	+ 1,750,000
Square timber (oak)	Cubic metres..	69,400	+ 26,000

TABLE showing Exports to Great Britain of Articles above 100*l.*
in Value.

EXPORTS TO GREAT BRITAIN.

Articles.	Value.
	£
Flour	908,000
Beans	22,000
Barley	130,000
Raw sugar	245,000
Oak extract	52,000
Mineral waters	48,000
Cellulose	25,000
Paper	8,000
Starch	23,000
Oak trunks	17,000
„ boards	5,500
„ parquettcs	1,100
„ staves	7,700
„ square	900
Shumac	420
Prunes	400
Talc	3,400
Tartaric acid	2,250
Hemp, raw	1,600
„ seed	4,000
Seeds, undenominated	700
„ millet	350
Linseed	100
Lentils	130
Medicinal herbs	1,000
„ roots	700
Insect powder	200
Gelatine	14,400
Glue	1,900
Sage	100
Wine (common)	2,000
Manganese ore	900
Rags	170
Fruit	325
Leather	2,900
Bran	210
Bent furniture	8,000
Wood, manufactured	2,500
Liqueurs (Maraschino di Zara)	6,800
Copper	300
Asphalte	1,250
Torpedoes (9)	3,750
Machinery	260
Glassware	750
Preserves	660
Macaroni	570
Sulphate of iron	130
Soap	350

EXPORTS TO MALTA.

Articles.	Value.
	£
Raw sugar	7,300
Lumber	3,750
Bent furniture	800
Tobacco (Hungarian)	700
Flour	300
Bruised barley	100
Maize	100
Beans	100
Seeds	100

EXPORTS TO GIBRALTAR.

Articles.	Value.
	£
Barley (for orders).. .. .	34,500
Tobacco (Hungarian)	11,500
Raw sugar	7,800
Paper	200
Oak staves	120
Bent furniture	130
Spirits	100
Beans	50

EXPORTS TO EAST INDIES.

Articles.	Value.
	£
Paper	1,200
Cellulose	1,200
Bent furniture	500

EXPORTS.

OAK STAVES.

Country.	Quantity.	Value.
	Number	£
France	47,653,000	873,730
Italy	4,514,000	82,757
Algeria	490,000	9,000
Portugal.. .. .	255,000	4,675
Sundries	145,000	2,660
Total	53,062,000	972,822
„ 1892	33,200,000	609,000

The values should not be given at more than 833,333/. The numbers given are the actual numbers shipped; but a reduction (1787)

of about 15 per cent. is necessary owing to trade usages by which the actual number is reduced to average measurements.

The average exports of oak staves during the last decade are 50,000,000 per annum, of which about 40,000,000 were shipped from Fiume, and 10,000,000 from Trieste.

Exports from Trieste have fallen from 15,000,000 to 7,500,000 during that period, whereas exports from Fiume have risen from 35,000,000 to 53,000,000.

EXPORTS OF OAK-TIMBER.

Country.	Trunks of Oak.	Square Oak Logs.	Boards and Planks.
	Cubic metres.	Cubic metres.	Cubic metres.
France	..	8,598	11,911
Italy	..	2,127	828
Algeria	..	..	1,339
United Kingdom	6,719	298	1,451
Holland	9,841	..	..
Belgium	1,811	1,082	2,689
Spain	..	1,209	..
Total	18,371	13,314	18,218
„ value	£ 46,000	40,000	68,300

EXPORTS OF SUGAR.

Country.	Quantity.	Value.
	Met. tons.	£
Italy	21,738	543,450
United Kingdom	9,777	244,430
Turkey	2,504	62,600
Gibraltar	311	7,800
Malta	292	7,300
Austria-Hungary	758	18,950
Total	35,380	884,530

A reduction of 60 per cent. on the official estimates is here necessary. The value may be taken at 10% per ton.

EXPORTS OF FLOUR.

Country.	Quantity.	Value.
	Met. tons.	£
United Kingdom	54,450	907,500
France	12,250	204,170
Brazil	9,380	156,400
Italy	250	4,170
Austria-Hungary	15,150	252,500
Total	91,480	1,524,740

These values may be reduced by one-third, viz., to 1,016,000*l.*, taking the ton at 11*l.* 2*s.* 2*d.* instead of 16*l.* 13*s.* 3*d.*

EXPORTS OF BARLEY.

Country.	Quantity.		Value.
	Tons.		£
United Kingdom	19,500		130,000
Holland	14,800		98,670
Gibraltar, f.o.	5,150		34,340
Belgium	3,800		25,340
United States	1,350		9,000
France	920		6,140
Italy	570		3,800
Germany	210		1,400
Austria-Hungary	980		6,540
Total	47,280		315,230

This article is valued at too low a figure, viz., 5 per cent. or 6 per cent.

EXPORTS OF BEANS.

Country.	Quantity.		Value.
	Tons.		£
United States	15,240		139,700
France	5,900		54,000
Italy	4,630		42,500
United Kingdom	2,430		22,300
Spain	1,080		9,900
Holland	840		7,700
Sundries	570		5,230
Total	30,690		281,330

As in the case of flour, these estimates must be reduced by one-third.

Countries.	Exports of—			
	Prunes.	Cellulose.	Oak Extract.	Starch.
	Tons.	Tons.	Tons.	Tons.
United Kingdom	..	1,572	6,232	762
United States	1,580	1,000	..	..
Belgium	124	..	2,600	..
Italy	218	600	163	81
France	..	..	440	60
Germany	27	..	1,200	..
Holland	158	..	93	..
Sundries	..	210	..	132
Total	2,107	3,382	10,728	1,035
„ value £	40,376	56,365	89,320	31,062

The estimates of prunes are reduced $3\frac{1}{2}$ per cent., cellulose by 75 per cent., and starch by one-third; oak extract should be one-third higher.

See Annex D.

General Remarks.

Foreign trade.
Increase.

The foreign trade, exclusive of the Austro-Hungarian coasting trade, at this port amounts to 8,553,659*l.*, *i.e.*, an increase of 2,763,282*l.*, or 48 per cent.

Share of
British trade.

Great Britain takes the lead with 2,784,401*l.*, this being an increase of 740,000*l.*, or nearly 33 per cent.

Actual
increase.
Reduced
percentage
share.

Notwithstanding this large increment of trade, the share of Great Britain in the foreign trade represents $32\frac{1}{2}$ per cent., as against $35\frac{1}{3}$ per cent. in 1892, having lost $2\frac{1}{3}$ per cent.

Percentage
share of
various
countries.

The percentage of the foreign trade, as shared by the various countries, appears in the following table:—

Country.	Percentage.	
	1892.	1893.
Great Britain	35·30	32·57
Italy	23·71	30·04
France	15·57	16·31
Russia	5·36	4·83
United States	6·11	4·61
Turkey	4·47	2·89
Brazil	2·60	2·83
Holland	1·84	1·72
Belgium	1·42	0·87
Japan	0·54	0·86
Spain	1·36	0·75
Germany .. .. .	.. .. .	0·56
Egypt	0·53	0·55
Greece	0·36	0·28
Sundries	0·84	0·33

Increased
trade.

The trade with the various countries shows a gain in the following instances, *viz.*:—

Country.	Value.
	£
Italy	1,198,000
Great Britain	740,000
France	503,000
Russia	102,000
Brazil	91,000
Japan	42,000
United States	40,000
Netherlands	40,000
Germany	32,000
Egypt	17,000
Greece	4,000
Total	2,809,000

and a loss in the following instances :—

Decreased
trade.

Country.						Value.
						£
Spain	..	..	..	..	..	16,000
Turkey	..	..	..	..	..	12,000
Belgium	..	..	..	..	..	9,000
Total	..	..	..	..	..	37,000

The order of the countries has undergone but little change.

If we include the Austro-Hungarian trade (coastwise) amounting to 2,040,000%, the following percentages of trade are obtained, Austria-Hungary being third in rank, viz. :—

Total trade.
Shares of
various
countries.

Country.						Percentage.	
						1892.	1893.
Great Britain	..	..	..	..	..	26·45	26·28
Italy	..	..	..	..	..	17·76	24·25
Austria-Hungary	..	..	..	..	..	25·10	19·26
France	..	..	..	..	..	11·66	13·26
Russia	..	..	..	..	..	4·02	3·90
United States	..	..	..	..	..	4·58	3·71
Turkey	..	..	..	..	..	3·35	2·33
Brazil	..	..	..	..	..	..	2·28
Sundries	..	..	..	..	..	7·08	4·73

Here it is seen that Great Britain has retained her share; Italy has wrested the second position from Austria-Hungary, and France has gained $1\frac{2}{3}$ per cent.

In Annex C is given a table showing the growth of trade at Fiume during the last 20 years.

Growth of
trade at
Fiume during
20 years.

From this table it appears that the imports are nearly 10 times what they were in 1877, and have doubled within the last 3 years. This is mainly owing to the large increase of wine imports, which may after all prove to be of transitory importance. Exports are seven times what they were in 1877, and have doubled within the years 1882–88; but since 1888 they are stationary, in fact, they receded from 68,000,000 ft. to 51,000,000 ft. between 1888–92, and have made up the lost ground only this year.

The only conclusion to be drawn is that the elasticity of trade at this port is no longer so great as in former years.

The large staple articles do not seem capable of much increase. Flour is very much what it was in point of importance 10 years ago. Oak staves have increased to 50,000,000; this is the average amount of shipments during the last 10 years, and a further increase is not likely. The importance of wine may con-

tinue to increase, but it may diminish, or the trade may disappear altogether. Barley and wheat are capable of much increase; barley has become a regular article of export, but wheat depends upon so many contingencies; it may be exported one year, and then disappear again for a decade. Sugar has become an important article of export, and much of the increase this year is due to sugar. It may further increase, so may phosphates, as an article of import. Naphtha, rice, tobacco, and jute are not likely to increase much in importance.

Altogether it is difficult to see where fresh trade is to come from, unless there is an exceptional grain-export year, or rape-seed comes to the rescue, which seldom occurs.

Harbour Extension.

Harbour
extension.

It has practically been decided upon to spend another 20,000,000 fl. on the Fiume Harbour. The plans are now in course of preparation. The scheme is intimately connected with the railway question.

The railway can, at a push, bring daily to Fiume 1,100 trucks (11,000 tons) of merchandise. But the manipulating power of the station and harbour is at present limited to 800 trucks. So the manipulating power of the port must be increased by about 50 per cent.

This object is to be attained firstly by increasing the shunting area of the station. This will be effected in the course of the present year at a cost of 60,000*l.* to 70,000*l.*, the space being reclaimed from the sea.

The second measure in contemplation is to relieve the station of the whole lumber traffic. This traffic has been recently (within the last year) diverted from the main harbour to the lumber harbour (Port Baross), which was specially constructed for that purpose. By this means the quay traffic of the main harbour has been relieved to a considerable extent, and the space in the bonded enclosure (*punto franco*) is now reserved entirely for bonded goods. But the lumber has still to pass through the Fiume station, whence it is diverted in the railway trucks on to the lumber yard and the Port Baross.

It is now proposed to divert the whole traffic of lumber and oak staves direct to the Port Baross without passing the Fiume station at all, from a convenient point one or two stations above Fiume. This will be, no doubt, a costly affair owing to the steep gradients and the nature of the ground (limestone), not to mention the cost of expropriation, but it is a trifling alternative in comparison to the more intricate question of doubling the line of rail.

Floating
dock.

The floating dock is now in operation and seems to answer its purpose for small vessels. Its utility for larger vessels appears doubtful, the dimensions being small, though the lifting power is 2,400 tons. Probably it will have to be enlarged, or a second half added. The charges are moderate and thus a long-felt want is supplied.

The building slip and yard is likewise finished, and occupation Building slip. will not be found wanting. It is expected that in the course of time part of the Government (Naval) work will be carried out here.

Sanitary.

The sanitary condition of the town has left much to be desired. Sanitary. Typhoid and scarlet fever, diphtheria, and croup have been in permanence, not to mention other diseases.

The movement of soil consequent on the laying of water-pipes and the pavement of the streets has much to do with this alarming state of things, but there remains an evil which constitutes a standing menace to all sanitation measures, and this is the cemetery. Situated at an elevation directly at the back of the town, it infects the whole of the water which filters through the porous limestone into the town below. This is, however, not the only cause of infection, for building is carried on without any system of drainage whatever, and the many insecure and defective cesspools which are supposed to supply the want, act in a similar way as does the cemetery.

It remains to be seen whether the waterworks, which are to supply the town with pure drinking water, and which are to come into operation at the end of the present year, will remedy these evils. It is to be hoped they may do so.

Meanwhile, however, Fiume is one of the most unhealthy cities in Europe, the mortality having risen to 38½ per 1,000 in the month of December last.

Annex A.—TABLE showing Total Value of all Articles Exported from and Imported to Fiume, by Sea, from and to Foreign Countries and Coastwise during the Years 1893–92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	1,619,017	1,126,215	1,165,384	917,941
Italy	978,290	625,958	1,591,352	746,867
France	1,369,163	888,168	35,417	13,464
Russia	1,615	2,046	411,095	308,753
United States	269,494	307,778	124,273	46,245
Turkey	160,825	111,261	86,132	148,184
Brazil	167,318	111,260	74,257	38,589
Netherlands	143,593	106,958	2,700	..
Belgium	72,651	78,418	872	3,657
Japan	..	..	72,887	81,157
Spain	35,653	37,572	27,519	41,277
Germany	13,081	3,970	34,180	11,286
Egypt	19,976	26,255	26,537	3,840
Greece	10,874	12,788	12,903	7,460
Sundries	27,571	26,165	30	6,845
Coastwise	804,544	801,440	1,236,070	1,136,917
Total	5,693,665	4,266,252	4,901,608	3,462,452

Annex B.—COMPARATIVE Table showing the respective Shares of the Various Countries in the Shipping and Trade at the Port of Fiume.

Countries.	Shipping.				Trade.	
	Steam Tonnage.	Sailing Tonnage.	Aggregate Tonnage.	Value of Cargoes.	Foreign Trade.	Total Trade.
	Per cent.	Per cent.	Per cent.	Per cent.	Per cent.	Per cent.
Austria-Hungary ...	64·44	54·87	63·35	57·33	...	19·26
Great Britain ...	27·23	...	24·16	29·14	32·57	26·28
Italy ...	5·75	41·21	9·80	11·30	30·04	24·25
France ...	...	...	...	...	16·31	13·26
United States ...	...	...	...	...	4·61	3·71
Russia ...	...	...	...	...	4·83	3·90
Turkey ...	...	...	...	...	2·89	2·33
Sundries ...	2·58	3·92	2·69	2·23	8·75	7·01

Annex C.—TABLE showing the Growth of Trade at Fiume during the Years 1874-93.

IMPORTS.

Year.	With Cargoes.		In Ballast.		Value of Cargoes.
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	
1874 ...	2,039	142,129	747	38,900	Florins. 10,500,000
1877 ...	1,723	120,143	994	46,900	6,500,000
1880 ...	1,732	228,158	950	114,500	8,020,000
1883 ...	2,525	408,000	931	173,900	21,712,000
1886 ...	2,714	420,728	1,112	236,000	21,761,000
1889 ...	3,410	522,600	1,794	293,000	26,203,000
1891 ...	4,616	640,000	1,668	290,000	34,284,000
1892 ...	4,716	575,500	1,507	235,000	41,553,000
1893 ...	4,796	694,000	1,491	293,000	58,819,000

EXPORTS.

Year.	With Cargoes.		In Ballast.		Value of Cargoes.
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	
1874 ...	1,617	120,000	1,168	60,000	Florins. 8,400,000
1877 ...	1,959	139,000	765	25,000	10,080,000
1880 ...	2,363	297,000	297	42,000	19,400,000
1882 ...	2,743	463,600	331	29,000	29,200,000
1884 ...	3,127	576,000	622	55,000	45,000,000
1886 ...	3,118	571,500	659	94,000	53,900,000
1888 ...	3,831	664,000	1,326	112,000	68,200,000
1890 ...	4,076	733,000	1,359	141,500	60,060,000
1892 ...	4,204	621,000	2,083	187,000	51,200,000
1893 ...	4,437	774,000	1,819	208,500	68,800,000

Annex D.—TABLE showing the Difference of Value of the Principal Articles of Import and Export at the Port of Fiume as compared with the Official Statistics.

EXPORTS.

Articles.	Official Estimate.	Corrected Estimate.
	£	£
Flour	1,525,000	1,016,000
Staves	973,000	833,000
Sugar	885,000	354,000
Barley	315,000	334,000
Beans	281,000	187,000
Oak timber.. ..	154,000	154,000
„ extract	89,000	120,600
Prunes	40,000	38,600
Starch	31,000	20,700
Cellulose	56,000	18,500
	4,350,000	3,071,400
Total exports	5,694,000	4,044,000

IMPORTS.

Articles.	Official Estimate.	Corrected Estimate.
	£	£
Wine	2,060,000	1,154,000
Naphtha oil, raw	404,000	513,000
„ refined	30,000	30,000
Rice, „ Burmese	487,000	487,000
„ „ Japanese	73,000	90,000
Tobacco	248,000	248,000
Jute.. .. .	242,000	218,000
Coffee	140,000	155,000
Cotton yarn	116,000	116,000
Coal, British	63,000	38,000
„ „ Austrian	30,000	12,000
Olive oil	53,000	46,000
Phosphate of iron	73,000	39,000
Dried fruit.. .. .	45,000	32,000
Iron, manganese	16,000	12,000
	4,080,000	3,190,000
Total imports	4,900,000	3,830,000

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AND FINANCE.

BELGIUM.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF ANTWERP AND DISTRICT.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1220.

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BELGIUM.

ANTWERP.

Consul-General G. R. de Courcy Perry to the Earl of Kimberley.

My Lord,

Antwerp, April 9, 1894.

I HAVE the honour to transmit to your Lordship the Commercial Reports for the year 1893 of the British Vice-Consuls at Antwerp, Ghent, and Liège respectively.

I have, &c.

(Signed) G. R. DE COURCY PERRY.

*Report on the Trade and Commerce of the Consular District of
Antwerp for the Year 1893.*

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The prevailing depression in commercial affairs was severely felt ^{Introductory.} throughout Belgium during the year 1893, and Antwerp as a great shipping centre suffered exceedingly. Although the number of vessels that arrived was greater than in the preceding year the quantity of merchandise landed and shipped showed a considerable falling-off. The system that prevails here of including the total tonnage of a ship in the returns, even when that vessel only discharges or loads at this port 100 tons of cargo, is most misleading and only serves the purpose of swelling the returns.

The Antwerp Chamber of Commerce to mark its dissatisfaction ^{River and} took the unusual step, in November last, of publicly protesting by ^{port charges.} means of huge posters against the inaction of the supreme Government in arriving at a settlement of the all important question of reducing or abolishing the river and port charges. The advocates of the measure are still actively engaged in propagating their views, but up to the present the question is unsolved. The town authorities have expressed their readiness to forego their share of the dues, and it only remains for the Government to make a similar sacrifice. That the country generally would eventually greatly benefit by such a measure is scarcely a matter for conjecture, as it is generally admitted that the high port charges at present levied are greatly prejudicial to commerce, and have done more than anything else to drive vessels to the rival ports of Hamburg, Rotterdam, and Dunkirk.

The following table shows the total quantity of cereals of all ^{Imports—} descriptions imported into Antwerp during the past year :— ^{Cereals.}

Articles.						Quantity.
						Bushels.
Wheat	..	..	..	..	..	36,706,000
Barley	..	..	..	..	..	7,484,000
Oats..	..	..	..	..	..	8,178,000
Rye ..	..	..	..	..	..	1,063,800
Maize	..	..	..	..	..	5,292,000
Total	..	..	..	..	..	58,723,800

Or an increase over that of the preceding year of about 9,500,000 bushels. In wheat the net increase amounted to about 1,500,000 bushels, and was due to the heavy imports from the Argentine Republic which exceed those of 1892 by no fewer than 9,000,000 bushels. On the other hand, imports from the United States were less by 4,300,000 bushels; from British India by 2,700,000 bushels; from the Danube by 890,000 bushels.

There was a corresponding decrease in the case of other countries, with the exception of the Black Sea and Sea of Azov whence there was a slight increase, in lesser quantities.

In transit.

Between 14,000,000 and 15,000,000 bushels of grain of various descriptions, which are included in the foregoing returns, were landed at Antwerp in transit.

Flour.

The imports of this staple during 1893 show a marked decrease when compared with the figures for the previous year. The following is a comparative table:—

From—						Quantity.	
						1893.	1892.
						Bags.	Bags.
United States	..	..	..	..	..	237,276	285,400
Canada	..	..	..	..	..	..	5,646
River Plate..	..	..	..	..	..	25,839	24,002
British India	..	..	..	..	..	4,466	27,771
Australia	..	..	..	..	..	..	226
Black Sea and Danube	..	..	..	..	..	1,821	2,827
Russia and Pomerania	..	..	..	..	..	51,511	65,097
Italy	..	..	..	..	..	..	222
Hungary	..	..	..	..	..	750	160
Hamburg and Bremen	..	..	..	..	..	3,922	1,459
Sweden	..	..	..	..	..	280	..
France	..	..	..	..	..	694	1,689
United Kingdom	..	..	..	..	..	3,690	18,550
Total	..	..	..	..	..	330,249	433,049

Or a falling-off of 102,800 bags. It will be noted that the decrease in the quantity of flour received from British India and from the United Kingdom is most marked.

Hemp.

There was a slight falling-off in the quantity imported, viz., 39,355 bales as compared with 40,531 bales in 1892.

As in former years there was no direct importation of this Jutes. fibre, but the quantity received from the United Kingdom was greatly in excess of former years, viz., 18,316 bales whereas in 1892 the number of bales was only 3,854.

At the beginning of the year the public sales of this staple Cotton. were brisk, and prices ruled higher than usual. A decline took place, however, later in the year and sales were duller.

It is generally admitted here that much greater care is exercised in packing the cotton in India than in the United States where the sole object of the exporter seems to be to press as much cotton as possible into a bale without the slightest regard to any foreign substance that may be gathered up in the process. The covering of the bales, moreover, leaves much to be desired, and the consequence is that whereas combustion among cotton from India is of very rare occurrence, the exact contrary may be said of American cotton.

The total number of bales imported into Antwerp during the year was 352,086 bales compared with 251,027 bales in 1892. Of the total quantity 103,638 bales were derived from the United States and 189,334 bales from British India.

The commerce in hides during the year was very unfavourable, Hides. and although the number imported exceeded that of the previous year, the sales were comparatively small and prices realised considerably lower; this latter circumstance was, no doubt, chiefly due to the inferior quality of the hides received from Buenos Ayres, there being scarcely a shipment received from that port that could be termed of really good quality. The total number of skins landed at Antwerp during 1893 was 1,504,253 skins, of which 229,806 skins were in transit.

The growing importance of the traffic in ivory at this port may Ivory. be estimated by the following comparative return:—

Year.							Quantity.
							Kilos.
In 1888	..	..	..	..	..	..	6,400
1889	..	..	..	..	..	..	46,600
1890	..	..	..	..	..	..	77,500
1891	..	..	..	..	..	..	55,900
1892	..	..	..	..	..	..	118,000
1893	..	..	..	..	..	..	224,000

that is to say, nearly double that of the previous year. In 1893 the total quantity of ivory imported into the United Kingdom from the West Coast of Africa was about 181,500 kilos.

Prices realised here at the public sales were on an average between 2 fr. and 3 fr. lower than in 1892. Sound tusks weighing about 157 lbs. fetched about 11s. per lb.

The year under consideration was not only a bad one for the Wool. importers of this staple, but for mill-owners. This state of affairs may be attributed to three causes, viz.:—

(1735)

A. 4

The McKinley Bill; the war of tariffs between Russia and Germany; and the coal strike in England, which for a considerable period paralysed the spinning industry of the country.

The imports for the Belgium market from the River Plate amounted to 92,259 bales of which 31,770 bales only were sold. In addition to the foregoing there were 5,350 bales of Australian wool placed on the market and sold.

Nitrate of soda.

The quantity of this fertiliser imported into Belgium during the year 1893 amounted to 102,000 tons, whereas in 1892 the quantity was 94,600 tons, of the above amount 76,000 tons were landed at Antwerp, and the remainder at Ostend and Ghent respectively.

Petroleum.

American petroleum to the extent of 728,850 barrels was imported into Antwerp during the past year. In 1892 the quantity was 688,299 barrels. Of Russian petroleum, 234,000 barrels were received. Prices obtained were even lower than in 1892, and the trade may be said to have reached a climax.

Rice.

There was a slight increase in the number of bags imported in 1893 compared with 1892, viz.: 662,856 bags against 651,809 bags. As usual, more than one-half of the total was derived from British Burmah. Very unremunerative prices were obtained.

Sugar.

The total exports from Antwerp of unrefined beetroot sugar amounted to 83,800 tons, of which 23,000 tons went to the United Kingdom. The United Kingdom also imported from Antwerp about 16,000 tons of loaf powdered and other descriptions of sugar. Of cane sugar, Antwerp imported 122,862 cases and bags, 95,706 of which were from Alexandria.

Tobacco.

The tobacco trade was in a very languishing condition throughout the year, and prices ruled low. The total quantity landed was as follows:—

Article.	Quantity.		
	Number of Hogsheads.	Number of Cases.	Number of Bales.
Tobacco	10,670	7,269	25,403

Were received:—

From—						Quantity.
						Bales.
Manila	..	..	..	..	..	3,848
Mexico	..	..	..	..	..	4,077
Brazil	..	..	..	..	..	1,568

Belgian coal trade.

According to official returns the total quantity of coal imported into Belgium was 286,000 tons, compared with 190,000 tons in 1892.

Unfortunately, England derived no benefit from this great increase, and it is to Germany that we must look to see where the benefit is gone. From that country no fewer than 279,000 tons were derived, whereas, in 1892, 187,000 tons only came thence into Belgium. The exports of Belgium coal last year reach 492,000 tons, against 352,000 tons in 1892.

The imports of iron ore into Belgium last year amounted to 168,000 tons; 11,000 tons of steel ingots, 8,000 tons of pig-iron, 3,000 tons machinery were also imported. The exports of iron were 691,000 tons compared with 766,000 tons in 1892. The Belgian iron market.

Shipping and Navigation.

The following is a return of all shipping at the port of Antwerp during the year 1893 :—

RETURN of all Shipping at the Port of Antwerp during the Year 1893.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Austrian ...	1	795	10	13,685	11	14,480
British ...	221	132,459	1,060	2,444,580	2,481	2,577,289
Belgian ...	3	258	808	449,534	311	449,792
Danish ...	25	4,598	117	108,679	142	113,637
Dutch ...	11	7,136	80	97,458	91	104,594
French ...	11	2,585	108	108,691	119	111,276
German ...	39	26,672	656	880,859	695	907,531
Greek ...	...	...	30	52,706	30	52,706
Italian ...	19	11,216	2	2,183	21	13,399
Norwegian ...	86	39,018	171	96,797	257	135,815
Portuguese ...	...	...	14	17,426	14	17,426
Russian ...	10	4,718	20	16,233	30	21,001
Spanish ...	...	...	45	42,071	45	42,071
Swedish ...	20	8,467	135	86,423	155	94,890
American ...	...	...	16	36,304	16	36,304
Total ...	546	238,282	3,872	4,453,929	4,418	4,692,211

The total number of river and canal craft of every description, Canal and arriving at and departing from Antwerp during the year 1893 was river traffic. 27,746, of an aggregate tonnage of 3,104,878 tons.

From France by inland navigation the principal articles received were phosphates and empty barrels; from Germany, coal and iron; and from Holland, cereals, flour, sugar, fruit and vegetables, and timber.

RETURN of Shipping at the Out-ports during the Year 1893.

Country.	Number of Vessels.	Tons.
Brussels	141	23,906
Louvain	4	561
Ostend	451	175,968
Newport	37	10,161
Termonde	4	469

RETURN of Seamen Discharged and Shipped at the British Consulate-General at Antwerp during the Year 1893.

	Number.
Discharged	8,896
Engaged	9,055
Total	17,951

In 1892 the total number of seamen shipped and discharged was 17,951.

The aggregate amount of wages paid in cash to the above seamen was 80,006*l.* 12*s.* 11*d.*

The total sum remitted to England by means of Board of Trade money-orders was 14,674*l.* 10*s.* 6*d.* In comparing this amount with the sum paid as wages, the fact must not be lost sight of that a large proportion of the crews of British vessels coming to this port are foreigners, and the number seems to be increasing.

GHENT.

Mr. Vice-Consul Hallett reports as follows :—

The total imports at Ghent by the Terneuzen-Ghent Canal during the year 1893 amounted to 450,659 tons, as compared with 457,281 tons for 1892; and the total exports amounted to 298,878 tons during 1893, compared with 290,584 tons for the preceding year.

Thus, although the imports for the year 1893 show a falling off of 6,622 tons as compared with 1892, the exports show for 1893 an increase of 8,294 tons over the year 1892. Therefore, in total, the year 1893 has the advantage of the preceding year by 1,672 tons.

This difference in favour of 1893 although slight is worthy of remark in presence of the recognised general commercial depression during the year, together with the strikes in the British coal mines in July, August, September and October, which stopped the usual coal imports at Ghent, and had a good deal to do with the falling off of shipping from 978 vessels in 1892 to 930 in 1893.

TABLE showing the Imports of different Articles for the Year 1893 compared with the Year 1892.

Articles.	Quantity.	
	1893.	1892.
	Tons.	Tons.
Timber	144,677	119,059
Grain	31,958	10,714
Manufactured yarns of flax, tow, jute, cotton, and wool	4,803	4,985
Raw cotton.. .. .	9,239	9,753
Raw flax, tow, hemp, and jute ..	38,212	43,020
Raw wool	11,322	9,241
Chemicals	22,016	28,038
Machinery	9,039	8,526

The attention will be chiefly drawn in the foregoing list to the Grain comparison of grain imports, namely, 31,958 tons during the year 1893, and only 10,714 tons in 1892. ^{imports.}

The difference consists principally in oats from Russia. The Drought in drought in the spring of 1893 caused a scare among Belgian agri- ^{Belgium.} culturists, who hastened to secure themselves from danger by importing from Russia, and Ghent shipping profited thereby.

Chemicals show a decrease of about 6,000 tons in 1893. This, ^{Chemicals.} notwithstanding that during the year there were 2,000 tons more each of ammoniac and sulphate of soda imported than in 1892.

The falling off was in nitrate from the Chilian ports, with ^{Nitrate from} which article only two vessels arrived at Ghent in 1893 as com- ^{Chile.} pared with 13 vessels in 1892. One large Ghent firm ceased importing in 1893, and Ghent shipping suffered in consequence.

Other articles imported during 1893, being about on a level in quantity with the preceding year, call for no special comment.

Ghent wood merchants, however, did an active commerce in ^{Baltic timber.} Baltic timber during 1893, and imported 144,677 tons as compared with 119,059 tons for 1892. They are greatly aided in their operations by the fine timber docks and spacious storage accommodation which the port affords, as well as by the very moderate charges.

TABLE showing the Exports of different Articles for the Year 1893 compared with the Year 1892.

Articles.	Quantity.	
	1893.	1892.
	Tons.	Tons.
Apples and onions.. ..	28,221	12,710
Potatoes	16,519	11,890
Chicory root	2,808	3,628
Bran	1,509	15,993
Cement	5,812	2,485
Sand	7,330	8,316
Manufactured piece-goods of cotton, jute, flax, wool, &c. ..	2,575	2,693
Manufactured yarns of hemp, cotton, wool, flax, tow, and jute	8,540	9,270
Colza oil	3,385	1,999
Iron girders	7,050	6,789
Beet sugar	39,861	21,028
Raw flax and tow	10,693	12,612

Potatoes,
apples, and
onions.

In the foregoing table the active exportation of potatoes, apples, and onions during 1893 at once engages the attention. The American crop had not been abundant, while the Belgian was all that could be desired, as was also that in the north of France, and not only were the regular steamship lines to Newcastle-on-Tyne, Leith, Hull, Goole, and London crowded with this produce, but during the season 58 separate vessels were chartered solely for the carriage of these articles sold to British merchants at very low prices.

Beet sugar.

In beet sugar exportation there was also a brisk trade done, namely 39,861 tons, during the year 1893, as compared with 21,028 tons in 1892.

Bran.

But the most striking difference turns upon bran, of which article only 1,509 tons were exported in 1893, as compared with 15,993 tons in 1892. The great falling-off was due to the drought before alluded to. There was little to export, and Denmark imported from Russia what she was accustomed to draw from Belgium.

Raw flax and
tow.

Ghent exported to the British Isles during 1893 a total of 10,693 tons of raw flax and tow as given in the foregoing table.

This shows a falling-off of 1,919 tons as compared with the previous year. The Irish crop was good, while that in Belgium was poor in quantity, and Russia supplied the British Isles with much of the lower numbers in which Belgium was deficient.

Courtrai flax
unrivalled.

For the best and finest numbers, however, Courtrai flax is unrivalled, and the quality had never been better. Ghent is the transit port for Courtrai flax.

Tonnage.

During 1893 a total of 930 ships, with an aggregate of 484,390 tons, entered Ghent port, of which nearly three-fourths were British.

Although the general shipping returns for 1893 show a decrease in total of 48 vessels as compared with 1892, yet British ships to Ghent numbered 683 in 1893, compared with 676 during the preceding year, thus an increase of 7 British vessels.

Eleven ships during 1893 entered Ghent dry docks, which were opened in the month of June, 1892, and general satisfaction was expressed at the facilities afforded, as well as at the moderate charges.

The improvements at the old entrepôt docks are hastening towards completion, and the dredging is already so far advanced as that the largest vessels can now swing at their discharging berths, instead of having to stop and turn at the timber dock, a $\frac{1}{4}$ mile distant, and come up stern first, which incurred for them both delay and danger.

The negotiations between the Belgian and Dutch Governments referred to in last report have made but little progress as concerning a new and larger lock at Terneuzen. It is agreed to have a new and larger lock, but the dimensions have not yet been decided upon, although an understanding on the subject is shortly expected.

Ghent is well and widely known for its active spinning and weaving industries, and the year 1893 will be remembered for the triumph of the four-loom system over the prejudices of the operative weavers, who thought their interests sacrificed thereby. They struck resolutely against its introduction, but certain manufacturers remained firm and overcame the opposition, with the result that, judging from the present aspect of the case, the four-loom system may be expected to receive general adoption.

The base of success in an industry being the largest production with the least expense, the weavers are gradually learning that it is precisely that which is the active principle in the four-loom system. Any serious opposition thereto may, therefore, now be considered as a thing of the past.

With the four-loom system the Ghent manufacturer is better able to compete with other markets by reason of a larger production at a lesser expense, while at the same time paying his operatives higher wages per week.

Before closing the present report upon the trade and commerce of Ghent during 1893, allusion must be made to the Agricultural Exhibition held in this town in the month of April.

These exhibitions are quinquennial, and it is unanimously agreed that this last greatly surpassed in magnificence all preceding ones.

Many of the specimens exhibited were particularly beautiful, and the interest they excited had never been equalled.

Choice varieties of flowers, plants, and trees were sent from all parts of Europe, and the number of visitors was very great.

A department was reserved for the exhibition of heating apparatus for conservatories, and in this branch, as well as in the sections for plants, flowers, and trees, British exhibitors had their share of distinction, and carried off well-merited prizes.

Population. The population of Ghent city at the close of the past year is registered at 153,803 inhabitants.
 Tabular shipping returns are appended.

RETURN of all Shipping at the Port of Ghent during the Year
 1893.

Nationality.	Steam.		Sailing.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	644	345,755	39	7,989	683	353,744
German	55	36,405	5	2,149	60	38,554
Danish	44	37,980	3	562	47	38,532
Norwegian	4	3,231	37	11,463	41	14,694
Russian	7	6,909	16	5,194	23	12,103
Belgian	21	9,295	...	...	21	9,295
Dutch	15	8,446	...	...	15	8,446
Swedish	8	3,080	5	1,958	13	5,038
French	...	...	25	2,430	25	2,430
Austrian	1	1,083	...	...	1	1,083
Portuguese... ..	1	471	...	...	1	471
Total	800	452,655	130	31,735	930	484,390

COMPARATIVE Statement of Shipping Arriving at Ghent during
 Ten Years from 1884-93 both inclusive.

Year.	Steam.		Sailing.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
1884	668	227,799	128	26,295	796	254,094
1885	692	253,626	113	26,266	805	279,882
1886	661	260,271	86	19,678	747	279,949
1887	747	325,226	70	19,740	817	344,966
1888	674	328,008	120	39,224	794	364,232
1889	753	362,411	122	33,106	875	395,517
1890	819	393,235	133	34,116	952	427,351
1891	912	465,808	103	27,990	1,015	493,798
1892	840	460,005	138	39,969	978	499,974
1893	800	452,655	130	31,735	930	484,390

RETURN of Importations at Ghent of Different Articles in Full
Cargoes during the Year 1893, and the Countries or Ports
from whence coming, excluding entirely the Mixed Cargoes
of Regular Liners.

Description of Cargoes.	Number of Vessels.	Registered Tons.	Name of Country or Port.
Coals	38	20,495	Great Britain.
Coal-pitch	15	4,180	"
Salt	4	2,577	"
Clay	12	1,685	"
Saltcake.. .. .	12	1,418	"
Creosote.. .. .	11	774	"
Flax	23	17,552	Russia.
Flax and timber ..	16	13,894	"
Flax and flaxseed ..	11	10,733	"
Oats	10	8,495	"
Flax and oats	9	8,068	"
Tow	5	5,382	"
Timber and sleepers ..	129	65,387	Sweden, Norway, Russia, and Germany.
Flax and sleepers ..	2	2,004	Russia.
Timber and oats ..	1	488	"
Grain and timber ..	1	1,029	"
Oilcake	1	329	"
Ore	39	9,169	Spain, Portugal, and France.
Cotton	2	2,890	Wilmington and Norfolk.
Nitrate	2	2,056	Chile.
Guano	1	644	Honolulu.
Wine	3	258	France.
Wood-pulp	1	129	Sweden.
Ballast	43	17,097	Sundry.

RETURN of all Exportations at Ghent Port during the Year 1893.

Description of Goods.	Number of Vessels.	Registered Tons.
General goods	521	274,127
Phosphates	88	20,432
Fruit	58	27,678
Pig-iron	14	11,337
Sugar	12	6,953
Macadam	9	2,856
Paving-stones	5	2,102
Bran	5	1,581
Coal and coke	4	3,193
Tiles	4	1,052
Cement	3	2,399
Wrought-iron	2	1,419
Chicory	2	1,000
Silver sand	2	731
Metal waste	2	343
Rye	1	362
Glassware	1	118
Sulphate	1	73
Ballast	191	120,474

RETURN of Total Weights of Ghent Imports and Exports by the Terneuzen-Ghent Canal during the Year 1893.

				Belgian Weight.	English Weight.
				Kilogrammes.	Tons.
Imports ..	..	..	..	457,419,165	450,659
Exports ..	..	..	..	303,361,700	298,878

LIÉGE.

Mr. Vice-Consul Menzies reports as follows:—

Coal-mining industry. As shown in a previous report the abnormal prosperity of the coal-mining industry in 1890 was so great that the working of the Liège coal mines during that year produced a profit which exceeded by 32,000% the united gains of the 14 previous years, and this fact must be taken into consideration in reference to the falling-off in the production and profits of the two years following.

Gross output. The production (gross output) of coal mines in the province of Liège during 1892 amounted to a total of 4,791,504 tons, showing a decrease compared with the output of the previous year of 87,263 tons, which added to the decrease experienced in 1891 show a total decrease of 264,927 tons, or 5·2 per cent. for the 2 years as compared with the output of the prosperous year of 1890.

The consumption of coal in the mines during 1892 amounted to 363,610 tons leaving 4,427,894 tons available for sale.

Coal in stock. On the other hand the amount of coal in stock, which amounted to 104,463 tons on December 31, 1892, showed a decrease of 14,350 tons as compared with the coal in stock at the end of the previous year, so that the total coal sold during 1892 amounted to 4,442,244 tons.

Total sales. This amount is only 26,080 tons less than that of the sales during 1891. Compared with 1889, in which year the sales attained the maximum, the falling-off amounts to 202,196 tons.

As the following table will show the reduction in the output was far from being equally divided between the different sorts of coal yielded by the Liège coalfields.

TABLE showing Output according to Quality during the Years 1891-92.

	Quantity.		
	1891.	1892.	Increase or Decrease.
	Tons.	Tons.	Tons.
Non-bituminous coal	598,116	587,528	- 10,588
Semi-bituminous coal	2,091,707	2,095,648	+ 3,941
Bituminous coal	2,168,944	2,108,328	- 80,616

The coal mines in the province of Liège are 89 in number, but only 44 are being worked, and of these 16 yield non-bituminous coal, 19 semi-bituminous coal, and 6 bituminous, while the remaining 3 yield both the latter sorts of coal. Number of coal-mines.

The number of pits being worked amount to 73, and of these 18 produce non-bituminous coal, 31 semi-bituminous coal, and 24 yield bituminous coal. The average production per pit amounts to only 32,640 tons of the first sort of coal, whereas it reaches 67,601 tons in second, and 87,847 in the last category. The total average output amounts to 65,637 tons. Number of pits worked.

The total value of the output which amounted to 71,197,520 fr. in 1890 and to 64,414,270 fr. in 1891 only amounted in 1892 to 51,625,600 fr., and thus in 2 years it diminished by more than 27 per cent. The average selling price per ton fell to 10 fr. 77 c., after having reached 14 fr. 8 c. in 1890, the decrease, as compared with the price in 1891, amounted to 2 fr. 43 c. per ton. Total average output.

The fall was especially marked in the price of bituminous coal, the other categories, particularly the non-bituminous, which are less sensible to the fluctuations of the industrial market, kept up the prices better, as is shown in the following table, which gives the prices realised during the 3 years under consideration. Total value.

TABLE showing Comparison of Selling Price per Ton during the Years 1890-92.

	Value per Ton.			Decrease in 1892 as compared with Maximum Prices.
	1890.	1891.	1892.	
	Fr. c.	Fr. c.	Fr. c.	
Non-bituminous coal	12 72	12 85	11 2	1 83
Semi-bituminous coal	13 80	13 48	11 13	2 67
Bituminous coal ..	14 73	13 3	10 34	4 39
Averages ..	14 8	13 20	10 77	3 31

I may here observe that the average price per ton, as given above, is not precisely the actual average selling price, because in (1735)

the calculation is included the coal consumed in the mines, which is often of inferior quality, and upon which the consumer fixed his own price.

The comparison of above figures with the preceding table, showing the output of the different qualities, may not be without interest.

Working expenses.

The total expenses of working the coal mines amounted to 47,441,570 fr. showing a decrease of 6,199,170 fr. as compared with the working expenses of the preceding year.

The ordinary working expenses were 43,215,510 fr. and the extra expenses 4,226,060 fr., or a decrease of 5,781,120 fr. in the former and of 418,050 fr. in the latter.

Average cost price per ton.

It results from the preceding figures that the total expenses per ton of coal brought to bank amounted in 1892 to 9 fr. 90 c. in which the ordinary working expenses figure to the extent of 9 fr. 2 c., a decrease of 1 fr. 2 c. on those of the previous year, and the extra expenses to the amount of 88 c. or 8 c. less than those of 1891; the cost price thus showing a decrease of 1 fr. 10 c. per ton.

Falling-off in profits.

As shown by a previous table the falling-off in the price of sale far exceeded the above reduction in the working expenses, and the profits realised by the coal mines in the district show a considerable decrease in consequence.

Profits.

The profits, which in 1890 amounted to 19,355,390 fr., and in 1891 to 10,773,530 fr., fell in 1892 to 4,184,030 fr.

Of the 44 mines worked in 1892, only 31 were worked at a profit, their united earnings amounting to 4,829,000 fr.

Loss.

The 13 others were worked at a loss amounting in the aggregate to 644,970 fr.

Total number of work-people.

The coal mines of the Liège basin gave employment in 1892 to 28,584 work-people, a decrease of 320 on those employed in 1891; of the above number 21,865 worked below ground, and 6,719 on the surface.

Wages.

The total amount paid in wages amounted to 28,729,170 fr. as against 32,596,730 fr. paid in 1891, showing a reduction of 3,867,560 fr., and the annual average wage per head fell from 1,128 fr. to 1,005 fr., a reduction of about 11 per cent.

As a matter of fact, however, the rate of wages paid was not reduced to the same extent, the average number of working days per mine having been less in 1892 than in the previous year, viz., 283 instead of 289.

Workpeople.

It is to be remarked that notwithstanding the slight falling-off in the number of workpeople in 1892, they were still more numerous than in 1890, when the output reached the maximum (5,056,431 tons). Rather than discharge a portion of their workpeople the owners preferred to reduce the number of working days, and the result was naturally a considerable falling-off in the output per head, which fell in 1892 to 168 tons, after having in 1888, before the rise in the price of coal, risen to 196 tons.

Output per head.

Output in 1888.

In 1888 the total output differed very little from that of 1892, 4,797,160 tons instead of 4,791,504 tons, although the number of miners employed in 1888 was only 24,510.

Thus the few prosperous years had the effect of increasing the Liège mining population by over 4,000 workmen, which the owners have made a duty of keeping on, and this at a real sacrifice, for for a less quantity of work the miner received in 1892 57 fr. more than in 1888, when his annual earnings only amounted to 948 fr.

It results, therefore, that what remains of the increased prices obtained for the coal since 1888 is beneficial to the miner alone, as is clearly shown by the following table:—

Year.	Output.	Amounts Paid in Wages.	Profit Realised.	Profit per Ton.	
				To the Miner.	To the Owner.
	Tons.	Francs.	Francs.	Fr. c.	Fr. c.
1888	4,797,168	23,243,560	3,837,510	4 84	0 80
1889	4,955,620	25,864,160	7,231,460	5 22	1 46
1890	5,056,431	32,326,000	19,355,390	6 39	3 83
1891	4,878,767	32,596,730	10,773,530	6 68	2 21
1892	4,791,504	28,729,170	4,184,030	6 0	0 87

The various workpeople employed are shown in the following table, which is made out in accordance with the different categories of workpeople to which the Law of December 13, 1889, regulating the work of the women, adolescents, and children, employed in the mines, applies; and is subdivided according to the age and sex of the workpeople employed respectively below ground and upon the surface.

WORKPEOPLE.

					Number.
UNDER GROUND WORKERS.					
Men and boys—					
Above 16 years	..	..	..	..	20,140
From 14 to 16 years	..	..	..	..	1,227
From 12 to 14 years	..	..	..	..	347
Women and girls—					
Above 21 years	..	..	..	..	80
From 16 to 21 years	..	..	..	..	65
From 14 to 16 years	..	..	..	..	6
Total	..	..	..	..	21,865
ABOVE GROUND WORKERS.					
Men and boys—					
Above 16 years	..	..	..	..	4,549
From 14 to 16 years	..	..	..	..	295
From 12 to 14 years	..	..	..	..	152
Women and girls—					
Above 21 years	..	..	..	..	507
From 16 to 21 years	..	..	..	..	754
From 12 to 16 years	..	..	..	..	462
Total	..	..	..	..	6,719
Grand total	..	..	..	..	28,584

Recent
Belgian
legislation
respecting
coal mines.

A brief reference here to some recent Belgian legislation respecting the working of the coal mines in this country may perhaps prove of interest.

On March 25 (1893) an "arrêté royal" regulating the mining industry definitely fixed the conditions of labour of the work people protected by the Law of December 13, 1889.

Limit of time.

This decree limits the time spent in the underground workings, inclusive of the descent and the return to the service, to a maximum of $10\frac{1}{2}$ hours for children and male adolescents of less than 16 years of age, and of 11 hours for girls and for women under 21 years, in accordance with Clause 9 of the Law above-mentioned, which, while prohibiting the employment underground of women or of girls under the age of 21, made an exception respecting those under the above limit of age who had been working previous to January 1, 1892.

Children.
Girls.

Periods of
rest.

The labour of these two categories of workpeople must be broken off by periods of rest of which the total duration must not be inferior to one-eighth of the time spent by them in the workings, without, however, it being necessary to fix the periods of repose at any particular hours of the day. Above ground the actual working time of the same class of workers is limited to $10\frac{1}{2}$ hours, with the obligation to divide it by periods of rest of at

least an hour and a half in the aggregate, which allows them to remain upon the workings for a period of 12 hours.

The above rules apply to the day work.

The 6th clause of the Law referred to prohibits in principle Night work. the employment of these workpeople between the hours of 9 P.M. 5 A.M. in the morning. Nevertheless, by exception to this general rule, the "arrêté" of March 25 permits of the employment during the night of male adolescents of not less than 14 years of age who are engaged in forming and repairing the galleries, or in banking up the workings; as well as of young girls and women over 16, employed in the lamp-rooms aboveground.

For the youths allowed to work underground, the rules regulating the duration of work and the periods of rest during the day are modified on one point only. The time spent below ground must not exceed 10 hours, instead of 10½ hours.

In conclusion of this portion of my report I beg to furnish two tables; the first giving statistics of the working of the Liège coal industry during 1892, and the other reproducing the figures by which is established a comparison of the progress of this industry during 1891-92.

GENERAL Statistics.

I.

COAL MINES.

	Number.
Working	44
Inactive	45
Total	89

PITS.

	Number.
Working	73
Inactive	22
Being sunk.. .. .	2
Total	97

ENGINES.

	Number.	Horse-power.
Winding engines—		
Working.. .. .	108	12,831
In reserve	12	502
In construction	4	63
Pumping engines	92	13,250
Ventilating engines	91	2,104
Engines for sundry purposes	319	3,099

WORKPEOPLE.

					Number.
Underground	..	..	..	..	21,865
Aboveground	..	..	..	..	6,719
Total	..	..	..	..	28,584

HORSES.

					Number.
Underground	..	..	..	..	647
Aboveground	..	..	..	..	244
Total	..	..	..	..	891

WORKING EXPENSES.

					Amount.
					Francs.
Ordinary working expenses	..	..	..	..	43,215,510
Extra expenses	..	..	..	..	4,226,060

WAGES.

					Amount.
					Francs.
Wages paid	..	..	..	..	28,729,170
Other expenses	..	..	..	..	18,712,400
Total expenses	..	..	..	..	47,441,570

		Value.	Quantity.
		Francs.	Tons.
Gross value of coal extracted	..	51,625,600	..
Total gross output.	..	..	4,791,504

II.

1. WORKPEOPLE.

			1891.	1892.	Difference for 1892.	
					Increase.	Decrease.
Underground	...	Number	22,418	21,865	...	553
Aboveground	...	"	6,496	6,719	233	...
Total	...	...	28,904	28,584	...	320
Total paid in wages	...	Francs	32,596,730	28,729,170	...	3,867,560
Mean annual wage	...	"	1,128	1,006	...	122

2. PRODUCTION.

			1891.	1892.	Difference for 1892.	
					Increase.	Decrease.
Total gross output ...	Tons	...	4,878,767	4,791,504	...	87,263
Average output per working pit ...	...	...	67,761	65,637	...	2,124
Average output per workman—						
Underground ...	...	...	218	219	1	...
Above ground ...	...	...	752	713	...	39
Both classes ...	...	...	169	168	...	1
Total value ...	Francs	...	64,414,270	51,625,600	...	12,788,670

3. EXPENSES.

			1891.	1892.	Difference for 1892.	
					Increase.	Decrease.
Ordinary working expenses ...	Francs	...	48,996,680	48,215,510	...	5,781,120
Extra expenses ...	...	...	4,644,110	4,226,060	...	418,050
Total expenses ...	...	...	53,640,740	47,441,570	...	6,199,170

4. PRICES.

			1891.	1892.	Difference for 1892.	
					Increase.	Decrease.
Average selling price per ton...	Francs	...	13·20	10·77	...	2·43
Average cost price per ton—						
Working expenses ...	...	...	6·68	5·99	...	0·69
Other expenses ...	...	...	4·82	3·91	...	0·41
Total ...	...	...	11·00	9·90	...	1·10
Average ordinary working expenses—						
Manual labour ...	...	...	6·27	5·60	...	0·67
Other expenses ...	...	...	3·77	3·42	...	0·35
Total ...	...	...	10·04	9·02	...	1·02
Average extra expenses—						
Manual labour ...	...	...	0·41	0·38	...	0·03
Other expenses ...	...	...	0·55	0·50	...	0·05
Total ...	...	...	0·96	0·88	...	0·08

5. RESULTS.

			1891.	1892.	Difference for 1892.	
					Increase.	Decrease.
Mines worked at a profit ...	Number	...	41	31	...	10
Profits made by them ...	Francs	...	11,180,840	4,829,000	...	6,351,840
Mines worked at a loss ...	Number	...	5	13	8	...
Losses made by them ...	Francs	...	407,310	644,970	237,660	...
General results—gains ...	...	...	10,773,530	4,184,030	...	6,589,500
Gain per ton ...	...	...	2·21	0·87	...	1·34

Manufacture of Coke for Smelting Purposes.

Coke. The following figures show the state of the coke-making industry during 1892 :—

	Number.	Quantity.	Value.
		Tons.	Fr. c.
Ovens—			
Working	1,152	..	..
Not working	844	..	..
Total	1,996	..	..
Workmen	586	..	..
Consumption of coal	..	671,512	..
Production of coke	..	488,472	..
Average value of coke per ton ..	..	..	14 51

Competition. The competition of German coke is year by year severely felt in this country, and the production in the Liège district hardly recovered during the year under consideration the heavy fall of 1891; the increase, it is true, amounted to 43,056 tons, or to nearly 10 per cent., but notwithstanding this improvement the amount of coke made was 94,413 tons less than in 1890, which already showed a falling off from the produce of the previous year.

Price. As regards the price obtained the fall was considerable, the average price per ton, as shown in above table, is less by 3 fr. 51 c. than that of the preceding year, and 9 fr. 45 c. less than in 1890, when the average price was 23 fr. 96 c. The prices have fallen as low as those which obtained before the rise in the price of coal.

Average production. It results from the figures given in above table that the average production of the calcination amounted to 73 per cent., which is the highest obtained up to the present time.

Strikes. During 1893, various strikes of more or less importance and duration occurred in the Liège district; which, though resulting in great misery to the workmen and their families, and great inconvenience and loss to the employers, in no case assumed, happily, any of the proportions of the terrible strikes which took place during the same period in England.

Rejection by the Chamber of universal suffrage. General strike ordered. Upon the rejection, on April 11, by the Chamber at Brussels of universal suffrage, by 115 votes against 26 votes and 2 abstentions, "La grève générale," or universal strike, was declared or ordered by the heads of the labour party at Brussels, "Le Conseil général du parti ouvrier"; but in this district the lesson learnt during the alarming coal-miners' strike referred to in my report published in 1892 (No. 1041) bore fruit, and notwithstanding the efforts of local demagogues, the attempt at a strike here fell through utterly. Several stormy meetings took place, and "cortèges" marched about in town; red flags were unfurled, &c.; but the strict measures adopted by the Bourgmestre authorities

Failure of attempt.

resulted in the movement being kept within bounds, and finally it collapsed completely.

In connection with the orders given for a general strike all over the country by the heads of the labour movement at Brussels, it may be observed that the employment of trades unions for political, almost for insurrectionary, purposes, is a new and very serious phenomenon. What has occurred in Belgium may take place in other countries; but meanwhile it is satisfactory to record that the movement fell through.

A protracted strike amongst weavers at Verviers caused much loss, inconvenience, and misery, and was unhappily attended by a resort to the terrible engine, dynamite.

On July 27 a dynamite cartridge was exploded in the opening to the cellar of the house of one of the mill owners at Ensival, near Verviers, but fortunately the effects were confined to the destruction of property.

Recently a strike which has lasted for some time, and is not yet finished, broke out among the workers in the stone quarries the valley of the Ourthe, a river in this district, and was also marked by sundry acts of violence and intimidation; and some of the working shoemakers in the neighbourhood have also been agitating and striking.

While on the subject of strikes, I append a few figures that might be read with profit and instruction by such members of the wage-earning class at home as are dissatisfied with the wages they earn in England.

The returns given are also interesting as showing the great advance made in the earning of the working people in this country since 1846, up to the date of the last returns, published in 1880.

MEAN Average Daily Wage of Workpeople of both Sexes over 16 Years of Age.

Industries.	As per Returns Published in 1846.	As per Returns Published in 1880.	
	Currency.	Currency.	Sterling.
	Fr. c.	Fr. c.	s. d.
Working of coal mines and coke-making ovens	1 97	3 30	2 7½
Working of stone and slate quarries, pottery, lime burning, and cement manufacture	1 50	3 25	2 7
Iron and steel, and other metallurgic works	1 64	3 61	2 10½
Making of chemical products	1 45	3 18	2 6¼
Glass making	2 29	4 71	3 9
Rope and string making and hemp working	0 64	2 26	1 9½
Cotton manufacture	1 41	2 53	2 0½
Manufacture of woollen goods	2 4	3 81	3 0½
Printing and paper and cardboard making	1 53	3 19	2 6½

Average
annual wage.

Savings of
workpeople.

As a general result the average annual wage per head of the workpeople of above categories which in 1846 only amounted to 352 fr. (14*l.* 1*s.* 7*d.*) depassed 846 fr. (33*l.* 16*s.* 10*d.*) in 1880. And, moreover, the general prosperity of the Belgian workman has also increased, for he has been able out of above wage to put by money, and one large glass-works in the neighbourhood of Liège has a savings bank for the benefit of its workmen with a capital to their credit of 7,500,000 fr. (293,330*l.*)

Firearms.

As the following figures will show, notwithstanding competition, and the high, in some instances almost prohibitory, customs tariffs of some foreign nations, the Liège gun-making industry is still well to the fore, and the number of arms proved greatly exceeds that of the other European proof houses not excepting Birmingham.

FIRE-ARMS Proved at Liège.

Description of Fire-arms.	Number.		
	1891.	1892.	1893.
Single barrel	993,037	609,366	649,644
Double barrel	493,667	289,977	344,956
Cheap single barrel for exportation ..	50,255	49,624	35,978
Horse pistols (per pair)	17,820	18,079	37,708
Pocket pistols and revolvers .. .	469,692	500,759	449,586
Military rifles and barrels	28,514	74,983	148,535
Total	2,052,985	1,542,788	1,666,410

American
duties.

Prosecutions
for alleged
forgery of
trade marks.

The heavy duty in America, resulting from what is known as the McKinley Act, is largely responsible for the falling off of the figures in the last two years. During the last year three separate prosecutions were instituted by one English and two American firms of gunmakers, against several Liège houses for infringement of their respective trade marks; the defendants admitted that the use of some of these marks had been going on for nearly 40 years; but the courts here held that as the trade marks in question had only been recently registered in this country, and sufficient notice had not been given to the Liège firms, no offence had been committed, and they acquitted them, giving costs against prosecution.

Population.

The total population of the province of Liège on December 31, 1892, amounted to 778,724 inhabitants, made up of the following districts ("arrondissements"): Liège, 439,413; Verviers, 176,670; Huy, 96,585; Waremme, 66,056. On the same date the city of Liège possessed a population of 155,898 inhabitants; Verviers, 50,003; and Huy, 14,712.

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1894.
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AND FINANCE.

BULGARIA.

REPORT FOR THE YEAR 1893
ON THE
TRADE, &c., OF BULGARIA.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1300.

*Presented to both Houses of Parliament by Command of Her Majesty,
AUGUST, 1894.*

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1381. New York	2d.	1441. Tahiti	½d.
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1383. Naples	1½d.	1443. Nagasaki	1d.
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BULGARIA.

SOFIA.

Mr. Dering to the Earl of Kimberley.

My Lord, Sofia, June 27, 1894.
I HAVE the honour to transmit to your Lordship Reports which have been addressed to me by Her Majesty's Vice-Consuls in this Principality, relating to the movement of Trade and Navigation in Bulgaria during the past year.
Your Lordship will notice with satisfaction the steady increase of commercial intercourse between Great Britain and Bulgaria, as shown by the statistics herewith annexed; and from information which has reached me from various sources, I am pleased to bear willing testimony to the energy and pains taken by the Consular representatives in this country for the advancement and development of trade with Great Britain. I feel sure that this assertion will be borne out by the various British shippers and firms who, during the course of the last twelvemonth, have applied to these officers for advice and assistance.
I have, &c.
(Signed) HENRY NEVILL DERING

Report on the Trade and Navigation in Bulgaria for the Year 1893.

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SOFIA.

Mr. Vice-Consul Hampson reports as follows:—

Introductory.

As will be seen from the annexed tables, compiled from the official statistics, the year 1893 witnessed a large increase in the foreign trade of the principality, and this in spite of the quarantine by which it was hampered during many months. Both imports and exports exceeded, in quantity and value, all previous records; and though complaints are heard from many centres, notably from Philippopolis, of stagnation and over-stocking, yet on the whole the commercial year must be regarded as a highly prosperous one.

Bulgaria is a young country, and the steady, if not rapid, advance which is annually made in her commerce with foreign countries must certainly be considered as a very healthy sign, more especially when it is noted that the value of the exports exceeds that of the imports by over 20,000*l*.

Exports.

The total weight of merchandise exported from Bulgaria during the year 1893 was 809,724 tons, of a value of 3,658,546*l*., showing an increase of about 265,000 tons and 650,000*l*. as compared with the exports of the previous year.

With the exception of some 165,000*l*., the exports from Bulgaria consist entirely of grain, cattle and animal produce.

Turkey still heads the list of the countries which consume

Bulgarian produce, the Suzerain Power importing from this principality to the value of over 980,000*l.*, of which over half is accounted for by grain.

Great Britain now holds the second place, having imported from Bulgaria during the year 1893 goods to the amount of 215,500 tons, of the value of nearly 682,000*l.*, being an increase on the previous year of 145,000 tons and 400,000*l.* This increase is practically entirely due to the larger quantity of Bulgarian grain shipped to England.

Germany occupies the third position as an importer from Bulgaria, with an increase of 110,000*l.* as compared with 1892. As in the case of Great Britain, this increase is also entirely due to a larger demand for grain.

France during 1893 decreased the value of her imports from this country by over 110,000*l.*, only importing 569,000*l.* in the past year as against 780,000*l.* in 1892.

Austria-Hungary and Italy come next in order, but the exports to neither of these countries reached a total value of 100,000*l.*

In examining more closely the statistics respecting the staple *Grain*. article of Bulgarian export, namely grain, it is seen that over 5,000,000 cwts., of a value of some 660,000*l.*, more grain was sent abroad during 1893 than during the previous year, the total export being now 15,692,000 cwts. (2,984,000*l.*). Of this total, Great Britain took Bulgarian grain to the value of 679,000*l.*, or nearly 400,000*l.* more than in 1892. Germany follows close behind with a consumption of Bulgarian grain to the value of 623,000*l.*, France and Turkey being the only other considerable consumers.

Although 50,000 head more of cattle were exported from *Live stock*. Bulgaria during last year than during the previous 12 months, the value of the animals fell by nearly 10,000*l.*, the totals being 762,000 head, worth 261,000*l.*, as against 719,000 head, worth 270,000*l.*

On the other hand, the value of hides and animal produce of *Hides and animal produce*. Bulgarian origin which went to foreign countries in 1893 shows an increase of 15,000*l.* The total value of these articles exported reaching 170,000*l.*

The value of textile goods exported in 1893 also shows a *Textiles*. considerable increase, reaching 138,000*l.* as against 125,000*l.* in 1892.

No other articles of export from the principality call for any remarks.

Imports.

There was a considerable increase, in both quantity and value, in the imports into Bulgaria during the year 1893 as compared with 1892, though not as large as in the case of exports. The total weight in tons of merchandise imported was 218,450 tons of a value of 3,634,700*l.*, in both cases the figures being larger than in any previous year, and exceeding by 45,000 tons and 550,000*l.* those for the preceding year.

(1822)

Austria still holds the place of honour as a supplier of the wants of the principality, with an increase of 18,000 tons and 180,000*l*. Of the total value of 1,800,000*l*. sent by Austria-Hungary to this country, over 300,000*l*. consisted of textile goods, and 236,000*l*. of colonial goods.

The United Kingdom maintains its position, as second in exporting to Bulgaria, with a total of 38,500 tons and 805,000*l*., being an increase of 12,000 tons and 95,000*l*. The value of textiles of British manufacture purchased by the principality in 1893 was 507,000*l*., or an increase of nearly 90,000*l*. as compared with 1892. Metals and metal ware, to the value of 121,000*l*., constituted the other great article of importation from Great Britain, having increased by 30,000*l*. The importation of British timber, furniture, &c., on the other hand, decreased in value by 17,000*l*. English coal was consumed in Bulgaria to the value of 24,000*l*., being more by 12,000*l*. than during 1892. Of the total fuel imported into Bulgaria, of the value of 37,000*l*., the United Kingdom therefore provides nearly two-thirds.

During the year 1893 Germany, continuing the advance which was so remarkable in the preceding year, replaced Turkey as the third country in importance from which Bulgaria purchased merchandise, the value of the imports having increased by 150,000*l*. and reaching a total of 482,500*l*. Textiles and metals were the most considerable articles imported.

The imports into Bulgaria to the value of 100,000*l*. and upwards were:—

Articles.						Value.
						£
Textiles	..	..	..	..	..	1,119,372
Colonial goods	..	..	..	..	..	364,448
Metals	..	..	..	..	..	339,077
Machinery	..	..	..	..	..	315,194
Leather	..	..	..	..	..	206,053
Timber and furniture	..	..	..	..	..	175,506
Wine, beer, &c.	..	..	..	..	..	150,048
Oils, wax, &c.	..	..	..	..	..	132,285
Stone, glass, and earthenware	..	..	..	..	..	112,470
Mineral oils, &c.	..	..	..	..	..	104,817

Sofia Trade.

Table G. gives the total weight of all goods which arrived at or were sent out from the station at Sofia during the year 1893, the former amounting to 93,675 tons, and the latter to 6,509 tons.

Table A.—RETURN of Exports to the following Countries for Five Years ended 1893.

Countries.	1889.		1890.		1891.		1892.		1893.	
	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£	Tons.	£	Tons.	£	Tons.	£
United Kingdom ..	114,335	503,817	156,072	597,472	167,962	671,120	69,571	292,268	215,565	681,804
France ..	135,843	735,613	139,226	779,853	186,228	970,284	152,505	780,073	114,088	569,288
Turkey ..	171,294	1,222,286	101,657	877,129	53,634	686,293	91,872	862,235	119,892	980,401
Austria-Hungary ..	29,359	142,331	58,406	230,024	16,066	125,262	16,663	127,038	8,708	92,017
Italy ..	12,439	65,898	10,820	61,870	10,239	58,867	19,701	107,159	13,705	86,528
Germany ..	13,431	49,375	4,600	19,830	14,087	41,797	133,535	520,647	159,797	632,726
Belgium ..	10,840	48,955	4,651	25,613	6,447	28,087	4,997	24,909	8,013	34,927
Roumania ..	22,344	63,624	6,823	19,846	6,395	27,597	14,934	59,977	5,674	24,083
Servia ..	1,324	14,327	1,063	8,283	416	21,404	365	14,577	134	7,880
Greece ..	8,657	49,285	3,057	28,845	2,359	17,871	579	5,986	3,627	20,648
Other countries ..	79,442	327,782	50,385	193,779	44,453	194,024	40,595	190,745	158,521	528,444
Total ..	599,458	3,223,243	586,730	2,842,044	507,286	2,842,606	545,307	2,985,614	809,724	3,658,546

SOFIA.

Table C.—RETURN of Imports from the following Countries for Five Years ended 1893.

Countries.	1889.		1890.		1891.		1892.		1893.	
	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£	Tons.	£	Tons.	£	Tons.	£
United Kingdom ..	20,651	847,735	25,132	800,816	26,046	633,793	26,154	717,185	38,486	804,855
Austria Hungary ..	48,287	899,637	61,538	1,320,230	55,819	1,359,708	70,848	1,124,107	88,196	1,300,634
Turkey ..	21,934	391,138	27,920	415,737	24,931	400,373	20,561	409,329	23,504	400,578
Russia ..	12,770	181,293	16,094	205,069	15,980	218,152	12,942	121,638	15,534	135,556
Germany ..	3,308	156,433	3,394	154,615	6,734	196,670	7,369	331,886	9,616	482,402
France ..	5,004	137,952	4,258	138,387	13,762	158,756	4,549	129,010	4,403	161,152
Roumania ..	22,618	53,578	21,618	87,372	19,184	72,659	17,102	59,238	18,107	86,206
Belgium ..	3,287	78,612	5,934	99,415	3,754	57,624	3,393	53,325	5,772	60,743
Italy ..	9,330	43,411	6,237	52,776	3,261	56,001	4,882	61,975	8,482	92,308
Switzerland ..	138	37,193	235	46,459	252	37,956	191	33,637	210	41,801
Servia ..	5,446	38,502	7,269	47,156	6,104	36,370	5,331	34,367	5,334	47,798
Other countries ..	251	9,231	404	19,187	840	19,884	799	17,324	805	20,683
Total ..	153,024	2,914,770	180,063	3,381,219	176,676	3,263,926	173,621	3,092,120	218,449	3,634,716

Table D.—RETURN of Principal Articles of Import for Five Years ended 1893.

Articles.	1889.		1890.		1891.		1892.		1893.	
	Quantity.	Value. £	Quantity. Tons.	Value. £	Quantity. Tons.	Value. £	Quantity. Tons.	Value. £	Quantity. Tons.	Value. £
Textiles	7,791	1,098,110	8,980	1,072,254	7,538	838,440	8,798	924,459	10,013	1,119,372
Machinery, &c. ..	7,771	56,255	2,323	200,982	1,732	361,140	1,887	238,482	3,714	315,194
Metals and wares ..	14,788	28,580	16,811	334,532	16,175	280,692	13,675	252,996	22,438	339,077
Colonial foods ..	10,156	259,600	14,102	317,572	10,949	265,812	12,335	281,766	14,298	364,448
Oils, candles, wax ..	3,513	114,360	3,469	131,100	3,917	142,387	4,095	136,597	3,882	132,285
Leather and wares ..	1,559	195,094	1,958	181,619	1,242	137,481	1,271	147,176	2,147	206,053
Wine, beer, spirits ..	4,765	121,956	7,752	188,092	6,033	130,738	3,417	86,448	5,481	150,048
Mineral oils, &c. ..	11,040	98,480	14,164	124,200	13,270	110,542	13,398	97,524	15,894	104,817
Timber, furniture, &c. ..	32,810	117,526	35,576	141,054	29,400	108,014	41,682	177,385	49,028	175,506
Stone, glass, earthen-ware, ...	9,330	69,093	10,792	85,534	20,430	99,570	10,475	79,266	15,804	112,470
Seeds, grains, &c. ..	3,333	39,564	4,330	46,804	7,333	84,591	6,166	76,990	5,340	69,569
Paper and wares ..	1,743	56,744	2,373	71,344	2,237	72,258	2,390	61,426	3,127	86,266
Railway and other wagons	124	15,422	14	8,816	4	45,573	8	24,324	11	16,325
Paints, dyes, &c. ..	2,457	51,904	1,200	45,240	1,419	38,570	1,316	37,727	1,645	48,164
Preserved fruits, &c. ..	950	22,840	1,040	23,426	1,227	31,156	1,406	32,901	1,403	44,137
Fuel	12,369	14,370	25,679	27,033	24,440	23,947	24,466	25,790	29,226	37,484
Jewellery and fancy goods	32	17,005	44	23,041	56	22,085	63	26,448	82	31,947
Fruits, vegetables, &c. ..	1,333	23,600	1,763	19,480	1,536	21,220	1,548	22,485	671	13,892
Chemicals	30,396	70,524	24,575	57,760	1,405	20,201	1,444	21,965	1,577	23,313
Various	3,764	188,593	4,078	286,366	26,158	429,409	23,781	236,965	32,668	245,350
Total	153,024	2,914,770	180,063	3,381,219	176,676	3,253,926	173,621	3,092,120	218,449	3,634,716

Table E.—VALUES in £ Sterling of Principal Imports into Bulgaria and Principal Countries of Importation
for the Years 1891-93.

Articles.	United Kingdom.			Austria-Hungary.			Turkey.			Russia.			Germany.			France.		
	1891.		1893.	1891.		1893.	1891.		1893.	1891.		1893.	1891.		1893.	1891.		1893.
	£	£		£	£		£	£		£	£	£	£	£		£	£	£
Cotton and woollen	384,566	442,162	507,419	216,158	230,553	300,408	83,244	88,040	92,041	6,354	7,341	10,459	85,072	52,883	83,056	34,253	25,989	34,006
Metals, medical wares	83,457	97,314	120,866	76,300	58,941	93,319	8,889	10,581	9,187	2,550	2,058	2,485	1,636	1,296	74,523	10,545	6,976	8,153
Colonial goods, &c.	6,187	4,323	58,033	140,019	163,155	236,162	24,221	35,835	31,983	2,457	184	1,389	2,616	2,747	11,624	11,624	12,811	16,386
Oil, wax, candles, &c.	...	...	4,477	10,111	13,390	17,753	85,802	88,270	75,961	441	126	284	353	409	1,647	27,464	16,966	22,296
Leather, and leather	7,228	8,149	11,658	26,861	31,545	41,494	42,988	44,205	56,481	7,262	5,277	1,584	11,061	13,377	22,121	21,081	22,680	25,764
Beer, wine, and spirits	120	211	144	75,532	62,745	109,753	10,487	5,804	10,180	37,083	19,939	18,583	1,826	1,132	1,385	5,311	3,361	7,293
Timber, furniture, &c.	424	18,321	1,239	73,332	127,640	176,939	12,152	13,251	12,252	746	1,098	1,886	1,464	2,680	4,738	601	1,705	1,074
Stone, glass, and	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...
Earthenware	3,793	4,330	4,224	44,756	44,967	69,032	7,941	6,770	6,433	298	333	254	6,088	5,060	5,616	21,240	7,524	8,733
Paper and paper wares	499	491	65,030	51,363	73,068	2,877	1,017	1,194	1,194	166	108	77	1,956	6,883	8,178	1,425	863	1,265
Fuel...	12,817	12,490	24,298	2,506	5,661	5,145	4,892	2,251	1,363	...	...	...	133	6	1	...	...	...

Table F.—RETURN of Bulgarian Grain Export during the Years 1891-93.

Countries.	1891.		1892.		1893.	
	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.
	Cwts.	£	Cwts.	£	Cwts.	£
United Kingdom ...	3,357,420	667,650	1,386,102	286,949	4,309,359	679,293
France ...	3,710,940	946,007	3,030,844	756,514	2,265,614	549,494
Turkey ...	796,120	177,254	1,533,486	384,153	2,104,736	483,850
Austria-Hungary ...	235,140	55,280	272,430	57,747	104,597	12,251
Italy ...	202,100	53,178	893,428	103,711	213,590	32,582
Germany ...	278,100	32,196	2,687,384	513,971	3,190,659	623,237
Belgium ...	128,940	23,077	99,830	24,373	160,160	34,731
Greece ...	42,980	8,564	9,990	1,696	71,251	17,305
Roumania ...	11,740	1,895	31,372	15,583	3,661	618
Servia ...	1,540	239	1,402	231	5	4
Other countries ...	823,420	166,877	926,992	172,299	3,228,603	500,916
Total ...	9,593,440	2,137,217	10,373,360	2,317,727	15,692,240	2,984,381

Table G.—WEIGHT in Tons of all Goods Sent from and Arrived at Sofia Station during the Year 1893.

Articles.	Sent.			Arrived.		
	Via Zaribrod.	Via Bellova.	To Sofia District.	Via Zaribrod.	Via Bellova.	From Sofia District.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
Grain ...	335	1,220	66	20	3,325	3,637
Flour ...	...	81	92	67	1,129	312
Beer ...	...	10	31	102	6	18
Wine ...	21	2	122	7	3,088	654
Spirits ...	...	67	127	565	54	8
Timber, &c. ...	20	24	58	3,707	758	11,160
Fire-bricks ...	...	25	150	...	20	60
Coal ...	...	10	110	50	190	780
Firewood ...	...	170	...	...	...	26,661
Packing materials ...	75	507	41	...	66	31
Wool ...	...	21	10	5	...	...
Petroleum ...	...	...	81	923	729	34
Iron ware ...	4	118	111	3,229	3,303	55
Sugar ...	...	26	108	1,848	1	5
Oil ...	...	1	5	11	18	...
Leather ...	11	2	2	52	31	...
Hides ...	149	11	5	20	167	9
Machinery ...	34	23	17	59	24	23
Rice ...	...	32	27	612	24	...
Cotton wool ...	1	9	21	118	156	2
Articles of food ...	44	54	17	6	728	4
Sea salt ...	...	13	405	...	2,728	323
Rock salt ...	...	...	60	622	...	...
Glass and china ...	1	12	17	414	43	5
Cement ...	...	40	156	3,545	556	...
Silk and cocoons ...	46	...	...	...	...	...
Bones ...	10	...	...	...	...	...
Walnut wood ...	60	...	...	...	80	2
Pottery ...	...	60	...	12	...	30
Vegetables, &c. ...	17	...	2	10	707	23
Brandy ...	...	15	...	...	147	35
Haberdashery ...	4	15	...	3	79	6
Clothing ...	8	63	...	13	34	6
Drugs ...	...	17	...	54	15	1
Instruments ...	3	4	...	8	2	...
Butter and cheese ...	...	598	...	127	3	57
Grease ...	13	17	...	62	88	5
Manufactured goods ...	2	7	...	55	246	...
Furniture ...	2	30	...	189	21	11
Fruit ...	12	13	...	2	857	11
Tobacco ...	...	47	...	...	252	...
Paper and books ...	...	40	...	820	41	...
Various ...	99	131	157	2,487	1,756	7,572
Total ...	971	3,370	2,168	21,078	21,460	51,545

				Arrived.		
				Viâ Zaribrod.	Viâ Bellova.	From Sofia District.
Horses ..	..	..	Head ..	76	62	2
Oxen ..	..	..	" ..	1	100	18
Sheep and pigs..	..	..	" ..	34	..	5
New railway carriages .	..	..	Pieces ..	14	..	..
Carriages ..	..	..	" ..	26	..	..
Corpses ..	..	..	" ..	4	..	..

New Ministries.

At the meeting of the Grand Sobranjé, in the spring of 1893, was voted, among other changes of the Constitution, the creation of two new Ministries, namely, one for commerce and agriculture, and one for public ways and communications. Both these Ministries are now in performance of their important functions.

Steamship Company.

A Bulgarian steamship company, to carry on the Black Sea coasting trade, was formed during the past year, and has purchased in England two small steamers for the sum of 41,200*l*.

Railways and Public Works.

The short railway, of some 35 kiloms., from Sofia to Pernik, was opened in the early summer of 1893, thus enabling the output of the coal mines at the last-named place to reach Sofia at a much smaller cost for transport. Considerable difficulties have been met with on this line owing to repeated landslips, but these appear now to have been overcome.

Great satisfaction has been expressed by the Bulgarian authorities with that portion of the rails for this line which was purchased from British firms, both in regard to quality and cheapness; and it is to be hoped that a British firm will also secure the contract for supplying the rails for the new line which is to be constructed from Sofia to Roman, a distance of 108 kiloms. The contract for the construction of this line fell, after a keen competition, to a Bulgarian syndicate for the sum of 859,000*l*.

Various other railway schemes were under discussion during the past year, notably one for the construction of a direct line from Sarambey, where the Bulgarian State line joins the Oriental Railway Company's line to Yamboly, from whence the line to Bourgas is again in the hands of the Bulgarian Government. It is calculated that, if such a line were constructed, the Bulgarian authorities, holding the communication between the port of

Bourgas and the interior entirely in their own hands, would be able largely to reduce the rate of freights now exacted by the Oriental Railway Company.

This will be of still greater importance as soon as the works for the improvement of the harbour at Bourgas are completed. The contract for these works was granted, in the autumn of 1893, to a Belgian firm for the sum of 169,200*l*.

New Coinage.

Tenders for the minting of 12,000,000 fr. in silver and 3,000,000 fr. in gold were invited by the Bulgarian Government in the month of March, 1893. The successful competitors were the Hungarian Industrial and Mercantile Bank of Buda-Pesth, whose prices were, for the gold coinage, 104 fr. 75 c., and for the silver 49 fr. 74 c. On these prices the Bulgarian Government hope to be able to make a considerable profit.

Sericulture.

The cultivation of the silkworm continues to make rapid strides forward. The following figures show the progress for the last four years in the yield of cocoons:—

Year.					Quantity.	Value.
					Cwts.	£
1890	..	..	..	..	1,320	6,980
1891	..	..	..	..	3,340	13,252
1892	..	..	..	..	4,200	24,884
1893	..	..	..	..	8,800	51,040

Before 1868 this industry was pursued to a considerable extent in Bulgaria, but the disease of pebrine, which at that date attacked the mulberry trees in this principality, in common with the rest of Europe, practically exterminated them. Five or six years ago the Government took energetic measures to resuscitate this source of income, so well suited to small farmers and peasant proprietors, providing them with healthy eggs, after Pasteur's system.

The centres of the industry are at Stainmaka, Peroushtitza, and Vratza. In the two former districts eggs from Asia Minor are most in favour; in the third those of Italian origin are preferred.

The boiling and scouring of the cocoons has also made considerable progress. At the factory of "Svila," at Stainmaka, during the past year about 1,600 cwts. of cocoons were purchased at an average price of about 2*s*. 6*d*. per kilo.

PHILIPPOLIS.

Mr. Vice-Consul Wratishlaw reports as follows :—

Imports.

In 1893 goods to the value of 502,982*l.* were imported through the Philippopolis custom-house, an increase of 32,436*l.* over the previous year. The following figures show the relative contributions of the principal importing countries to this total :—

Country.	Value.	
	1892.	1893.
	£	£
Great Britain	144,149	175,080
Austria	171,676	151,599
Turkey	61,910	59,895
Germany	22,649	34,582
France	25,742	31,156
Italy	9,700	14,326
Other countries	34,720	36,394
Total	470,546	502,982

Though the absolute increase of this year's over last year's imports is not inconsiderable, there has been a relative decrease compared to the whole of Bulgaria. In 1892 the imports at Philippopolis accounted for over 15 per cent. of the whole; they fell last year to rather less than 14 per cent.

The increased activity in the import market is largely due to the Philippopolis Exhibition held in the autumn of 1892, which attracted a considerable number of sightseers from other parts of Bulgaria and stimulated local business. Consequently stocks had to be renewed in 1893, and purchases appear to have been somewhat rashly made.

It is satisfactory to note that the anticipated improvement in British trade with this district, referred to in last year's report, ^{imports.} has been fully realised. Great Britain, which in 1892 imported 25,000*l.* worth of goods less than Austria, now comes first and exceeds Austria by nearly the same amount, the total increase of British imports amounting to more than 30,000*l.* This improved state of affairs is not due, so far as I can ascertain, to any abnormal circumstance or to special orders on a large scale not likely to be repeated, and there seems every probability that our ascendancy in the Philippopolis market will be maintained in future. It is worthy of remark that several Constantinople houses importing British goods have established branches here during the past year.

The importation of Lancashire goods in general has increased. Cotton goods.

In the higher numbers of cotton yarns, foreign importers can only compete with us by means of false markings, but in the lower numbers our goods suffer much from rivals, at Trieste, Salonica, and Piræus. In prints of the better class for ladies' wear, Austria, Germany, and to a smaller extent France, are doing a fair trade to the detriment of British manufacturers.

Woollens. The Yorkshire trade in woollens expanded in 1893, and the outlook in this branch of British imports is decidedly bright.

Sacks, &c. Flour sacks and Hessians have been exclusively imported from Dundee, and gunny bags from Calcutta. The increase in the latter is especially noticeable.

Hardware. The trade with Sheffield and Birmingham has also been looking up, in spite of strong German competition. Buyers in Eastern Roumelia are generally poor and the temptation is strong to purchase a cheap article without looking closely into its quality. Notwithstanding this tendency, I have heard of several instances where customers have abandoned German and Austrian firms in favour of British manufacturers, although the latter's prices were higher.

Minerals. Copper and block tin continue to be imported from Great Britain.

Agricultural machines. A few reapers of American manufacture were imported during the year, as well as a French thrashing set. The latter worked satisfactorily on trial during the thrashing season last autumn, but has not yet found a buyer. A similar machine made by a leading British firm is to arrive this summer, and will doubtless perform still better.

Chemicals. Caustic soda and other chemicals have been imported to a less extent owing to higher prices.

Exports.

The exports from the Philippopolis custom-house amounted to 113,323*l.*, an increase of 20,000*l.* over 1892. The principal customer of the district was Turkey, who took 83,000*l.* worth, Austria coming next with 20,000*l.* But by far the greater part of the produce of the district was exported through the custom-house of Hermanli on the Bulgaro-Turkish frontier, where the exports for the year amounted to 550,000*l.* Turkey again accounted for more than half, viz. 330,000*l.* Great Britain following with 123,500*l.*, and France with 102,000*l.* In 1892 Great Britain took only 3,000*l.* worth from both these custom-houses together.

Cereals. As usual, the great bulk of the exports consisted of cereals, the other productions of the country being of relatively little importance. The grain crop of 1893 was decidedly inferior in quantity to that of 1892, though the quality was slightly superior. Added to this the abnormally low prices which prevailed rendered the year a disastrous one to our agriculturists. The increase in the value of the exports is easily explained by the fact that a very considerable proportion of the 1892 crop was held over till 1893

on account of the low prices offered. These having fallen rather than risen, holders of grain were at last obliged to sell at a considerable loss, and the custom-house returns for 1893 were increased accordingly.

The average prices per 100 kilos. f.o.b. at Dede Agatch or Bourgas were as follows:—

Articles.	Per 100 Kilos.		Per Ton.
	1892.	1893.	1893.
	Fr. c.	Fr. c.	£ s. d.
Wheat	13 50	11 50	4 12 0
Rye	11 25	9 50	3 16 0
Oats	11 25	10 50	4 4 0
Barley	..	9 30	3 14 6
Maize	9 25	8 75	3 10 0

These prices have fallen still lower at the time of writing (May).

A point to be noticed in the export trade of this district is the growing preference shown for Bourgas over Dede Agatch as an outlet for the grain grown in the country along the Oriental Railways line between Yamboli and Tirnova Semenli. To counteract this tendency the company offer, and not always successfully, considerable reductions of freight, reaching so much as 40 per cent. for the most distant stations, to all merchants exporting large quantities of grain by the Dede Agatch route.

The yield for 1893 was a good one, and amounted in round numbers to 2,000 kilos. (4,400 lbs.). Buying prices ranged from 900 fr. to 1,100 fr. per kilo. according to quality, and selling prices from 1,100 fr. to 1,200 fr. per kilo. About two-thirds of the total yield was exported during the year, and the value of this added to the portion of the 1892 yield which was held over till the following year would bring the total value of the year's export to at least 65,000%. The custom-house returns, however, only report a total amount of less than 6,000% under the heading of perfumery exported.

The otto went as usual to France, Germany, England, and the United States.

The outlook for the present year is very promising and a large yield is anticipated.

The crop of cocoons was an excellent one and prices were good, 3 fr. to 3 fr. 40 c. per kilo. of fresh cocoons. It is, however, a matter for great regret that in spite of the successful results obtained last year, the silk-worm breeders of Stanimaka, the chief centre of this industry in the whole of Bulgaria, have this year purchased considerably less seed than in 1893.

The "Svila" factory exported to France 2,000 kilos. of silk spun from native cocoons. This is far from being the full possible (1822)

output of the factory, but the low price of silk prevailing last year in the European market was not remunerative.

Tobacco.

The tobacco crop for the whole of Bulgaria is estimated at 2,214,050 kilos., an increase of nearly 100,000 kilos. over 1892. Of this amount the districts of Haskeny and Philippopolis accounted for 787,720 kilos. and 386,630 kilos. respectively. A small proportion was exported to France and Germany.

In January of this year, the "Banderole" or government stamp duty on manufactured tobacco was doubled, and it now ranges from 8 fr. per kilo. on the fifth or lowest quality, to 24 fr. per kilo. on the first quality. It was anticipated that the revenue would thus be largely increased, but from the accounts which I have received from the tobacco factories here, it seems likely that this most unpopular tax will be productive of no profit. One factory, whose speciality is the manufacture of high quality tobacco, turned out in the first 4 months of 1893 35,958 kilos. of tobacco and paid the Government 189,056 fr. in stamp duty; during the corresponding period of this year it has produced only 19,828 kilos. of tobacco, and in spite of the doubled duty has paid the Government several thousand francs less. In both factories the number of hands employed has been enormously reduced.

No increase in the preventative service accompanied the doubling of the duty, and smuggling is now rampant in the country. The peasants engaged in tobacco growing are very uneasy, while the owners of factories predict the speedy ruin of their industry.

Wine.

Owing to the extreme severity of the winter, the vintage of 1893 was a complete failure and no wine was exported.

Skins.

In this article too the weather was responsible for short production, as a number of lambs died prematurely. The skins which were exported went to Vienna at the price of 2 fr. each. Kid skins were sold 26 fr. and 27 fr. per dozen franco Paris.

General Remarks.

In an essentially agricultural country like Bulgaria, trade in general is inextricably bound up with the success of the crops and the prices obtained for them. Last year's crop of grain was poor and the prices abnormally low. Consequently the peasants, who form the great mass of purchasers of imported goods, are extremely short of money, and have with difficulty been able to pay the heavy Government and communal taxes and keep body and soul together. Furthermore, the tithe was in 1893 for the first time paid in money instead of kind, the amount being calculated on an average of 4 good years. Even deducting the 15 per cent. reduction allowed off this average, a peasant last year had to dispose of far more than one-tenth of his crop in order to pay the tithe on account of the extremely low prices, and in many cases additional distress was caused by the rigorous exaction of arrears. The purchasing power of the country is thus considerably reduced at the present moment,

and on the other hand stocks of imported goods are unnecessarily large. When the moment comes for paying for the latter, obligations will in many cases not be met, and the manufacturers, mostly Austrian, who have of late years so recklessly accorded credit in the Eastern Roumelian market will have to pay dearly for their mistake. I would, therefore earnestly impress on British merchants and manufacturers the necessity for considerable caution in their dealings with this part of Bulgaria for some time to come.

BOURGAS.

Mr. Vice-Consul MacGregor reports as follows :—

On reviewing the trade of Bourgas for the year 1893 it is satisfactory to note that, although both imports and exports show a considerable diminution, Great Britain not only holds the first place as an importer, but now ranks as the Power whose steamers appear most frequently at this port.

The causes of the general falling-off in commercial activity are various, but the following may be mentioned as the principal :— The comparative failure of the harvest in this part of Bulgaria, and the consequent distress among the peasantry, whose livelihood, one may say, almost entirely depends on the success of their crops; the abnormally low prices prevailing on the Bourgas market, which rendered it next to impossible for the cultivator to dispose of his stock so as to recuperate himself for the cost of harvesting and conveying to the coast; and the paralysing effect produced upon general trade by the capricious application of quarantine regulations by the Bulgarian Sanitary Authorities.

The commanding position occupied by Great Britain is the more remarkable when we take into consideration the criticisms so frequently passed on the system generally followed by merchants at home in their dealings with this country. It is pointed out that sufficient pains are not taken to solicit orders through commercial travellers, who might not only visit the principal centres, but penetrate into the outlying districts, and, by means of samples and illustrated price lists drawn up in French or Bulgarian, acquaint the inhabitants more closely with the nature of the goods we could supply. Again, the disinclination of the British merchant to allow credit, and his indifference to the demand for cheap goods of an inferior quality, are made subjects of warning and adverse comment, and Austria, whose system is in all these respects entirely opposed to that actually followed by the British merchant, is quoted as an example of what might be done with the view of extending our trade. Without going so far as to say that in course of time some concessions to the principles in favour of our foreign competitors might not advantageously be made, I think it is sufficiently noteworthy that, in spite—may it not be in consequence?—of our cautious and conservative methods British trade should have succeeded in gaining the prestige it now possesses here.

(1822)

B 2

Increase of
direct steam
communica-
tion with
Great Britain.

One is led to attribute this pleasing result mainly to the steadily-increasing development of direct steam communication with Great Britain, and also to the reasonableness of the freights by all our lines, in which respect we stand unequalled, and, indeed, appear to be driving our rivals out of the field. Nor must we lose sight of the still unimpeached reputation of British goods for that solidity and honesty of workmanship which form an ample compensation for their initial costliness as compared with the goods furnished by other countries.

Imports.

British
imports.

During 1893 Great Britain imported goods to the value of 79,653*l.* as compared with 64,554*l.* in the preceding year, the principal articles being textiles and cotton yarns, iron and iron goods, copper, zinc, lead, coffee, chemicals, and coal. As regards the first of these items, her position is as yet unassailed, but Belgium is becoming a formidable competitor for iron and rails.

Austrian
imports.

Austria comes next, her imports amounting to 60,468*l.*, or 19,185*l.* less than those of Great Britain. Her specialities are, as formerly, sugar, cigarette-paper, and matches, and she also supplies paper, kitchen utensils, crockery, and spirits.

Turkish
imports.

More than 40,000*l.*, representing sums of money sent in groups from Constantinople, go to swell the total of the imports from Turkey, which include live stock, oil, fish, fresh and dried fruit, wood, coal, and woven fabrics. It should be noted that the tendency of the smaller retail dealers to buy European goods from large foreign firms in Constantinople is steadily increasing.

Russian
imports.

Russia imported chiefly petroleum, this product having almost entirely driven its American rival from this market.

French
imports.

France imported goods to the value of 17,091*l.*, the principal articles being leather and skins (6,363*l.*), quick-lime, tiles, drain-pipes, lead, and cement.

German
imports.

Germany imported chiefly nails, crockery, lamps, and rails, worth in all 13,302*l.*

Italian
imports.

The unusually large figure representing the value of Italian imports is accounted for by the fact that the yield from the Anchio salt pans having completely failed owing to the inroads of the sea during a violent gale, the supply of salt had to be brought from Italy at a cost of 5,563*l.* The damage done to the Anchio salt pans has, however, been repaired at a cost of 1,280*l.*, and there is every prospect of this year's production being fully up to the average. The other articles furnished by Italy are rice, leather, and boots.

Belgian
imports.

The principal articles imported by Belgium were nails, zinc, window-glass, pig-iron, wheels for railway carriages, and rails, in which class of goods, as already stated, Great Britain here meets with a keen competitor.

Japan imported rice, and Holland chiefly candles.

Exports.

As compared with the figures for 1892, the exports from Bourgas have decreased by 145,778*l.*, their total value being 330,691*l.*, as against 476,469*l.* in 1892. Diminution of export trade.

This falling-off is principally to be explained by the unsatisfactory condition of the corn trade, which has for some time been in a state of unprecedented dulness, nor is there at present any prospect of improvement, as the tithe which has hitherto been paid in kind, will henceforward be payable in cash, the amount of duty being calculated on the yield of five prosperous years; and France, the principal purchaser on the Bourgas market, has now imposed a tax upon foreign wheat of 7 fr. per 100 kilos., which, taken in conjunction with the price at present ruling here, viz., 9 fr. 50 c. per 100 kilos., can hardly fail to have a disastrous effect upon the market.

It will thus be seen that the outlook for the farmer in this district is far from promising, even leaving out of account his primitive methods of tilling the soil and harvesting his crop, manure being never used, and modern agricultural appliances, though slowly gaining in popularity, being still looked upon askance. Prospects of the Bulgarian agriculturalist.

The Yamboli-Bourgas Railway.

Although this line cannot yet be considered to have entered on an era of prosperity, I believe that last year an actual deficit was avoided, and I am told that measures are in contemplation for farther increasing the usefulness of this railroad. The heavy differential tariffs, however, which still prevail on the Oriental Railway Company's Line render competition difficult, if not impossible, and grain continues to be sent from the Radné, Mahallé, and Nova Lagora districts to Dédéaghatch, instead of to Bourgas, which latter would appear to be its natural destination. But this ceases to excite astonishment when one learns that by a system of private bargains between the Oriental Railway Company and their clients a discount, amounting occasionally to as much as 47½ per cent., is allowed on the carriage of corn from Yamboli to Dédéaghatch. Yamboli-Bourgas railway. Differential tariffs on Oriental Railways.

Shipping.

Fifty-two British steamers entered this port, and the following British figures will give an idea of the progress that has been made in this direction during the last 4 years:—

Year.						Number of British Steamers.
In 1890..	..	..	..	..	..	23
1891..	..	..	..	..	..	44
1892..	..	..	..	..	..	47
1893..	..	..	..	..	..	52

It would almost appear as if in a few years the entire carrying trade of this port were destined to be monopolised by British ships, which already bring considerable cargoes from Antwerp and convey the greater part of the grain exported to France at rates with which no foreign line appears able to compete.

French
shipping.
Austrian
shipping.

The French Messageries Maritimes steamers have ceased to touch at Bourgas, and the Austrian Lloyd's Agency has been suppressed and replaced by a correspondent. The Lloyd steamers now calling here only twice a month on their way from Constantinople.

Bulgarian
shipping.

The postal service between Bourgas and Varna, which was formerly entrusted to the Austrian Lloyd, is now carried on by a small Bulgarian steamer, which touches here twice a week, occasionally calling at Anchialo and Sizopolis.

German
shipping.

The Deutsche Levante Linie has ceased making this a regular port of call, and only sends its steamers by special contract, but the Turkish "Courtji" Line and the Greek steamer "Kimi" still continue their regular service between Constantinople, Bourgas, and Varna, while the number of sailing vessels is still considerable.

Turkish and
Greek
shipping.

Public Works.

New sea-wall.

As regards public works, the most important undertaking achieved during the past year is the building of a sandstone sea-wall, about 250 yards long, in front of the bank of sand and mud which hitherto had formed the quay of Bourgas, and where the custom-house depôts and the railway terminus stand.

New
prefecture.

The block of buildings which is to unite under one roof the prefecture and other departmental offices is slowly approaching completion, and two well-built barracks for the accommodation of the garrison have been erected on a commanding and (comparatively speaking) salubrious site near the town.

Military
barracks.

Paving and
lighting.

I am informed that some progress has been made in paving and lighting the streets of Bourgas, and a rough-and-ready macadam actually exists in some of the more frequented thoroughfares; but dirty and tortuous lanes, destitute of pavement and almost impassable after dark, are still the general rule.

Bourgas
harbour.

The projected harbour works have not yet been commenced, but it is expected that during 1894 this most necessary undertaking will be advanced, although it is calculated that at least 5 years must elapse before it can be brought to completion.

The Government has decided to connect the town of Aitos on the Yamboli-Bourgas line with Provadia, a station on the Roust-chouk-Varna Railway, by means of a chaussée some 90 kiloms. in length, of which 47 kiloms lie within the district of Bourgas. The work will be done by forced labour, every peasant being compelled to give his services for 10 days or to pay 20 fr. in lieu of labour, and all the expense of providing and conveying stones, earth, &c., will thus be avoided by the Treasury. The actual work of road-making has not been commenced, but twelve small iron bridges have already been erected, and their number will eventually be forty-five, costing the Government about 30,000 fr. When this chaussée is completed, it will be possible, under favourable conditions, to accomplish the journey from Provadia to Aitos in a single day, so that travellers will have an alternative to the sea route by Varna and Bourgas, and a large district will be brought within reach of two lines of railway, a result which can hardly fail to be most beneficial to the inhabitants.

Aitos-
Provadia
Chaussée.

Final Remarks.

I feel a certain diffidence in hazarding a forecast of what fortunes may await the commerce of Bourgas during the next few years, but I think it may fairly be said that, taking into consideration the anomalous political condition of the country generally, the bad harvest, prolonged quarantine, the absence of a harbour, and the crushing tariff system of the Oriental Railway Company, trade has not suffered so much as might have been expected, and that, although at the present moment the outlook is not brilliant there is no reason to doubt the ultimate realisation of the hopes entertained regarding the future of Bourgas as the distributing centre of southern Bulgaria.

Annex A (1 and 2).—RETURN of all Shipping at the Port of Bourgas during the Year 1893.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	52	...	52	...
Austrian	1	...	7	...	8	...
German	...	...	8	...	8	...
Greek	17	...	41	...	58	...
Turkish	111	...	3	...	114	...
Bulgarian	...	...	31	...	31	...
Italian	...	...	3	...	3	...
French	...	...	9	...	9	...
Spanish	...	...	1	...	1	...
Norwegian	...	...	1	...	1	...
Roumanian	1	...	...	...	1	...
Russian	1	...	...	...	1	...
Samian	2	...	...	...	2	...
Total	133	10,688	156	99,694	289	110,382

Annex B (1).—RETURN of Principal Articles of Export from
Bourgas during the Years 1893–92.

Articles.		Quantity.	Value.	
		1893.	1893.	1892.
			£	£
Live stock.	Head ..	15,667	5,352	..
Animal food products	Cwts. ..	1,540	3,027	..
Grain and grain products ..	Quarters	290,673	298,187	..
Vegetables, plants, seeds, &c. ..	Cwts. ..	1,694	565	..
Colonials (tobacco)	" ..	1,304	2,222	..
Combustibles (firewood and charcoal)	" ..	40,031	3,064	..
Perfumery (otto of roses, rose-water, &c.)	" ..	638	391	..
Furs, skins, hides, &c.	" ..	1,877	3,834	..
Textiles ("Abba," "Gaitan") ..	" ..	1,566	10,378	..
Paint, dye-stuffs, varnishes ..	" ..	807	2,036	..
Wood, wooden goods, furniture ..	" ..	11,612	1,502	..
Various	" ..	116	125	..
Total	..	..	330,683	415,107

Annex B (2).—RETURN of Principal Articles of Import to Bourgas
during the Years 1893–92.

Articles.		Quantity.	Value.	
		1893.	1893.	1892.
			£	£
Animal food products	Cwts. ..	5,204	6,439	..
Grain and grain products	Quarters	4,591	4,452	..
Fruit, vegetables, &c.	Cwts. ..	990	970	..
Colonials	" ..	29,355	37,561	..
Liquids and beverages	Kilos. ..	264,558	8,322	..
Tinned provisions	Cwts. ..	6,981	7,841	..
Chemical products	" ..	2,412	1,903	..
Paints, dye-stuffs, varnishes ..	" ..	1,665	4,858	..
Mineral oils, resin, &c.	" ..	66,536	20,214	..
Vegetable oils, candles, soap, &c.	" ..	11,976	20,591	..
Earthenware, glass, stoneware ..	" ..	38,548	10,605	..
Metals and hardware	" ..	116,182	95,485	..
Wood, wooden goods, furniture ..	" ..	35,279	7,685	..
Paper and stationery	" ..	4,075	5,624	..
Skins, leather, boots and shoes ..	" ..	2,106	13,863	..
Cotton-yarn and textiles	" ..	18,523	56,525	..
Machinery	" ..	2,479	5,321	..
Matches, cartridge, guns	" ..	1,520	2,610	..
Caoutchouc and guttapercha ..	" ..	67	812	..
Manure	" ..	15	147	..
Combustibles (coal, wood)	" ..	120,415	7,558	..
Drugs and medicines	" ..	195	1,149	..
Perfumery	" ..	45	326	..
Books, engravings, ornaments ..	" ..	149	1,755	..
Various	" ..	88,304	6,199	..
Total	..	..	328,815	476,469

Annex C.—TABLE showing Total Value of all Articles Exported from and Imported to Bourgas during the Years 1893–92.

Country.	1893.		1892.	
	Imports.	Exports.	Imports.	Exports.
	£	£	£	£
Great Britain	79,653	6,484	..	..
Austria	60,468	2,091	..	..
France	17,091	169,432	..	..
Germany	13,302	19,678	..	..
Belgium	10,606	2,649	..	..
Russia	27,029	289	..	..
Italy	14,988	789	..	..
Japan	2,083	..	..	..
Switzerland	1,782	..	..	..
Holland	682	..	..	..
Greece	514	4,656	..	..
Spain	..	48,858	..	..
Turkey	94,972	71,831	..	..
Roumania	4,961	3,934	..	..
Various.. .. .	693	..	..	..
Total	328,824	330,691	415,107	476,469

VARNA.

Mr. Vice-Consul Brophy reports as follows:—

General Review.

The trade of the year under review does not present any marked characteristics or tendency distinguishing it from its immediate predecessors; the increase or decrease of different categories of imported goods being mostly normal and accountable for by the state of the stocks in hand remaining over from the previous year, while the percentage participation of the various countries remains about the same. Not much change in imports.

Both imports and exports, however, in spite of the quarantine restrictions prevailing during the best part of the last 12 months, show an increase: the former of 15 per cent. as to quantity, but only 5 per cent. as to value; but this is to be explained by the large increase of coal imported, a low priced article, as compared with the small quantity landed here in 1892. Increase.

The harvest of 1893 fully bore out the promise of spring, being from 25 per cent. to 33 per cent. over average, thus permitting shipments 40 per cent. greater in bulk than in the previous year, but unfortunately the values realised on them amounted to only 23 per cent. more, this being of course owing to the low prices of grain. Harvest abundant but prices low.

As regards British commercial interests it is gratifying to be British shipping.

attained
premier
position.

able to point out that while the bulk of the grain carrying trade has always fallen to British vessels, this is the first time that British shipping has attained the premier position as regards cargoes imported.

Imports and
exports well
above the
average.

In fact, in some respects 1893 may be considered as a record year for Varna, its imports and exports being larger than those of any of the preceding 10 years, or since the time that anything like accurate statistics have become available.

Trade will
probably
show a
decline next
year.

The prices of grain, however, have been so wretchedly low during the first 5 months of this present year, with no hardening tendency, that it is probable, as the coming harvest can hardly be expected to equal its foregoer, that the next year's trade report will not show such satisfactory results.

Imports.

Slight
increase.

As mentioned above, imports show a slight increase, which if the coal cargoes were left aside would amount to about 8 per cent. or 10 per cent. in value on the other products.

The principal of these show a decrease in six of the categories of goods, varying from 5 per cent. to 40 per cent., while there is an improvement of from 5 per cent. to 46 per cent. in six other classes.

Principal
British
imports.

British exporting firms are concerned mainly with colonials, textiles, metals, machinery, &c.

The figures for the first named show a slight falling-off, ascribable to the existence of reserves from the large importations of the previous year; the second, third, and fourth, an augmentation of respectively 11 per cent., 5 per cent., and 46 per cent.

Agricultural
machinery.

A good number of light and cheap German ploughs, half iron, half wood, are imported, but on the holdings, larger and more expensive instruments do not find a sale, although in the Bulgarian Dobroudja by Baltchik, where the farms are larger, some reaping machines, and especially a form of Hornsby's reaper and self-binder, which has now been modified by lessening the draught and by constructing the knife-board to cut on the right hand side, thus adapting it for use with oxen, has found favour and is likely to meet with an increased demand.

English
reapers
especially
adapted for
the country.

German
trade
increasing.

German imports with a value of 32,000*l.*, now take a modest fourth place, coming after Austria-Hungary with 98,000*l.*, and before France with 28,000*l.* But it must be borne in mind that in 1891 and 1892 that country figured for only 16,000*l.* and 22,000*l.*, respectively, thus showing that German manufacturers may be on the way to become formidable competitors in this market. It must be added, however, that during this period Germany took an increasing quantity of Bulgarian grain, but as the tariff war with Russia has now come to an end, her purchases will very possibly dwindle to almost nothing, and may be, if the commercial dictum is true—though falsified by the relative exchanges between Austria and Bulgaria—her future sales also may be affected thereby.

The sales of foreign spirits—from Hungary and Russia—indicate a decline of about one-fifth, and it is not unlikely that this tendency will be accentuated in coming years. Alcohol.

Exports.

Last year's spring and summer weather—with the exception of an extremely heavy hailstorm in the month of July, which played great local havoc in the fields and vineyards—was extremely favourable for cereals, and particularly for maize and other spring sown crops, so that there was a large surplus for exportation.

The price per ton of grain in general during the year 1893 averaged 4*l.* 11*s.* 2*d.*, as against 5*l.* 12*s.* 6*d.* in 1892.

In connection with this subject it will be well to mention that, since 1892, the tithe payment in kind of one-tenth of the produce has been commuted to a money tax based on the average combined yields and values during the 5 years 1888–92. Tithes commuted likely to prove onerous if yield or prices low.

Now these representative years either produce fair harvest, or else the price fetched by grain was very remunerative as compared with the present and prospective standards, so that the commuted tax stands rather high.

Should, therefore, the ensuing crop prove a short one it is very probable that the Government will have to cope with a widespread discontent among the agricultural population and be forced either to reduce this money payment, or else to revert to the old system of receiving payment in kind.

This last year the superabundant yield counteracted upon the otherwise certain loss caused by bad prices, but it is evident that such a favourable circumstance cannot always be safely counted upon to tide the peasant over his difficulties.

There seems to have been a slight recovery in the amount exported as compared with the figures for the previous year. But as the chief poultry breeders, the Mussulman villagers, have lately been emigrating at the rate of 2,000 persons per annum from the six immediate districts alone composing the Prefecture of Varna with a total population of 206,614 souls, whereof 92,817 are Mussulmans, this branch of local trade will probably go on declining. Poultry.
Mussulman emigration continues.

Show a diminution of nearly 40 per cent., but this was probably owing to the severe winter of 1892–93 having caused serious mortality among sheep and cattle. Hides and skins.

As a rule, the natural grass lands hereabouts do not produce more hay than barely sufficient for the local wants, and that notwithstanding that the principal fodder given to cattle and horses is bruised straw. Hay: speculators for export dropped money.

It happened, however, that the spring weather of 1893 was exceptionally favourable for the growth of grass, and this combined with the phenomenally high prices obtainable for hay in all the west and north of Europe during the early summer induced speculators to go in for buying up hay, ordering compressing

machines, &c. They burnt their fingers seriously however; principally because they omitted to, or were incapable of entering into the necessary calculations such as to the space taken up by 1 ton of hay and the consequent cost of freight, &c.

Balance of Trade.

Result
favourable.

As is seen in the tables appended, the imports at the port of Varna amounted to 638,000*l.*, whereas the exports represented 652,000*l.* The grain shipped from the port of Balchik may be safely put down at about 280,000*l.*, from which would have to be deducted about 10,000*l.* for imports, thus leaving for these two ports a balance of 284,000*l.* in favour of the principality.

Shipping.

Statistics
lacking in
some cases.

British
occupies first
place.

Extent of
tranship-
ment trade
decreasing,
but competi-
tion greater.

Bulgarian
steamship
company will
shortly
commence
operations.

The official navigation returns for the port of Varna furnished by the Statistical Bureau were this year so absurdly erroneous and defective as to be utterly useless. It was, fortunately, possible to obtain trustworthy details on most of the points from other sources, but as regards the quantity and values of merchandise discharged and shipped by vessels under the Turkish and Greek flags, these had to be lumped together. The trade report for the year 1892 pointed out that our British shipping at Varna was drawing up on a level, in all respects, with that under the Austrian flag, but last year was the first time that the number (81) and tonnage (98,119) of British steamers, as well as the quantity and values of their cargoes both discharged and shipped at this place, have surpassed those of the Austrian.

It is perfectly true that had it not been for the quarantine imposed upon arrivals from Constantinople, the number of the Austrian vessels might have been doubled, but it is to be doubted if they would have brought much more cargo, not only because they have many and increasing competitors in the transshipment trade from that port, but also because there is a marked tendency of late years for goods to be shipped direct, whether it be from London and Liverpool or from Hamburg and Antwerp. Some years ago the carrying trade between Constantinople, Bourgas, and Varna was virtually monopolised by the Austrian Lloyd Company, but since then a Turkish Steamship Company, the Kourtdje, and a small Greek steamer have entered into competition, and this present year will probably see at least three new and serious rivals on the scene. Of the two boats ordered last year by this sub-ventioned company, one, the smaller intended for the coasting trade between the Bulgarian ports, has already been launched on the Tyne, and will probably commence running regularly towards the end of June; and the other is to be ready a month later.

Freights began low, about 7*s.* 6*d.* per ton wheat, but later on

they improved, getting up to 13s., and the average was a trifle higher than during the previous year.

Last year the advisability of British exporting firms wishing to push their manufactures giving the metrical equivalents of British weights and measures was pointed out, and it now appears that the Bulgarian Government will shortly insist upon all ships' manifests and bills of lading indicating the weight in kilogrammes of whatsoever merchandise may be borne on them.

Freights: an improvement on previous year.
Notice to shippers: weight of goods must be indicated in kilogrammes.

Public Works

The highroads connecting Varna with Shumla (about 90 kiloms.), Varna with Dobritch (50 kiloms.), and Dobritch with Baltechik (30 kiloms.) are all but finished, and the same may be said for the small branch line of railway (20 kiloms.) connecting Shumla Town with Shumla Road. In addition to this, a road across the Balkans from the railway station of Pravadi on the north to that of Aidos on the south has been commenced.

It is expected that next year the harbour works of this port will be commenced.

Road-making.

RETURN of Imports and Exports at the Port of Varna during the Year 1893.

Class of Goods.		Imports.		Exports.		Observations (Proportions compared with Previous Year and Gross Value per Ton).
		Quantity.	Value.	Quantity.	Value.	
1. Live-stock—sheep, poultry, &c.	..	1	£ 6	351,350	17,945	Exports: mostly poultry, to Turkey and France Increase, about 20 per cent.
2. Meat, fresh and cured ..	..	335	8,610	1,060	87,210	Exports: all to Turkey. Increase, 44 per cent. Per ton, about 37½.
3. Grain and farinaceous products	..	839	10,120	125,359	572,355	Exports: wheat; increase, 42 per cent.; value, increase, 22 per cent. Per ton, about 4½. 2d.
4. Fruit, vegetable, and seeds ..	..	413	6,230	116	800	Imports: from Turkey. Value, ton about 16½.
5. Colonials ..	..	2,587	69,920	53	2,420	Exports: Value per ton, 7½
6. Alcohol, wine, beer, spirits, &c..	..	460	14,240	3	35	Imports: decrease, 05 per cent. Value per ton, about 27½.
7. Preserved provisions and confectionery	..	384	8,880	3	70	Imports: decrease, 20 per cent. Value per ton, about 31½.
8. Manure, refuse, and grain-tailings	..	3	500	31	850	Imports: decrease, 07 per cent. Value per ton, about 27½.
9. Fuel ..	..	2,925	4,680	..	..	Imports: clearly erroneous; value given being impossible.
10. Chemical products ..	..	354	4,150	25	120	Imports: coal about twice as much.
11. Dye-stuffs, paints, and varnish..	..	266	6,300	1	5	Imports: about the same. Value per ton, about 13½.
12. Resins, gums, and mineral oils..	..	1,490	10,010	..	..	Imports: decrease, 10 per cent. Value per ton, about 23½.
13. Oils, fats, and their products ..	..	1,323	39,770	6	130	Imports: decrease, 35 per cent. Value per ton, about 7½.
	..					Imports: decrease, 07 per cent. Value per ton, about 30½.

RETURN of Imports and Exports at the Port of Varna during the Year 1893—continued.

Class of Goods.		Imports.		Exports.		Observations (Proportions compared with Previous Year and Gross Value per Ton).
		Quantity.	Value.	Quantity.	Value.	
14. Drugs, medicines, &c.	.. ..	27	£ 2,470	..	£ ..	Imports : increase, '37 per cent. Value per ton, about 91 <i>l</i> .
15. Perfumery .. ..	.. ..	6	665	..	.. 20	Imports : increase, '25 per cent. Value per ton, about 8 <i>l</i> .
16. Earthenware, glass, and stoneware ..	.. ..	2,155	12,585	..	..	Imports : increase, '05 per cent. Value per ton, about 13 <i>l</i> .
17. Metals, rough and wrought .. ..	.. ..	8,665	48,860	..	..	Imports : decrease, '40 per cent. Value per ton, about 4 <i>l</i> .
18. Wood and timber, rough and worked ..	.. ..	3,455	14,660	177	1,815	Imports : about the same. Value per ton, about 21 <i>l</i> .
19. Paper and paper-pulp .. ..	.. ..	374	8,015	..	..	Imports : increase, '38 per cent. Value per ton, about 86 <i>l</i> .
20. Leather, skins and furs, dressed and undressed .. ..	.. ..	562	48,205	228	8,710	Exports, decrease, '38 per cent. Value per ton, 38 <i>l</i> .
21. Textiles and felt .. ..	.. ..	2,992	295,580	51	9,615	Imports : increase, '11 per cent. Value per ton, about 99 <i>l</i> .
22. Indianrubber and oilcloth .. ..	.. ..	9	1,130	..	..	Exports, increase, '12 per cent. Value per ton, 188 <i>l</i> .
23. Railway plant, carriages and boats ..	.. ..	7	110	..	..	Imports : about the same. Value per ton, about 125 <i>l</i> .
24. Machines, instruments, &c. .. ..	.. ..	252	13,500	..	..	Imports : increase, '46 per cent. Value per ton, about 54 <i>l</i> .
25. Ironmongery, fancy goods, and jewellery ..	.. ..	19	6,235	..	..	Imports : about twice as much. Value per ton, about 330 <i>l</i> .

RETURN of Imports and Exports at the Port of Varna during the Year 1893—continued.

Class of Goods.		Imports.		Exports.		Observations (Proportions compared with Previous Year and Gross Value per Ton).
		Quantity.	Value.	Quantity.	Value.	
26. Books and works of art ..	Tons ..	5	£ 565	..	£ ..	Imports: decrease, 33 per cent. Value per ton, about 3½.
27. Articles other than the above ..	" ..	1,380	3,320	..	..	
Total ..	..	26,290	638,830	127,123	652,100	
" 1892 ..	..	22,903	606,700	90,823	527,900	
Increase per cent. compared with 1892 ..	..	15	05	40	23	

RECAPITULATION.

Year.		Value per Ton.			
		Imports.		Exports.	
1893 ..	..	£	s. d.	£	s. d.
1892 ..	..	24	6 0	5	2 6
		26	10 0	5	12 6

RETURN of Imports and Exports at the Port of Varna during the Year 1893.

Countries.	Imports.			Exports.			Observations.
	Quantity.	Value.	Per Cent.	Quantity.	Value.	Per Cent.	
	Tons.	£		Tons.	£		Imports: Value per ton— £
Great Britain ..	9,105	297,950	.46	49,000	196,270	.30	33
Austria ..	4,864	97,800	.15	61	2,150	..	20
Belgium ..	1,445	13,800	.02	3,186	17,420	.03	9
France..	877	28,250	.05	27,232	124,350	.20	32
Germany ..	721	32,025	.05	13,404	67,000	.10	44
Greece..	89	1,570	..	2,110	14,160	.02	17
Italy ..	771	13,380	.02	8,350	44,170	.06	17
Russia..	1,819	18,900	.03	..	..	..	10
Switzerland ..	31	7,400	.01	..	..	..	240
Turkey..	6,206	121,600	.20	23,780	186,550	.29	20
Other countries ..	362	6,155	.01	..	..	..	17
Total ..	26,290	638,830	1.00	127,123	652,100	1.00	..
" 1892 ..	22,903	606,700	..	90,323	527,900	..	..

SOFIA.

RETURN of all Shipping at the Port of Varna during the Year
1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.		Value of Cargoes.
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	
British	...	...	81	98,119	81	98,119	£ 247,790
Austrian	...	...	57	52,532	57	52,532	240,890
Italian	1	307	7	10,432	8	10,739	150
French	...	...	8	10,060	8	10,060	15,000
Greek	12	3,045	28	7,763	40	10,808	15,000
Turkish	97	11,000	77	28,500	174	39,500	95,000
German	...	...	8	10,258	8	10,258	25,000
Others	...	...	3	2,897	3	2,897	...
Total	110	14,352	269	220,561	379	234,913	638,830
„ for the year preceding ...	55	7,020	298	260,691	353	267,711	608,700

CLEARED.

Nationality.	Sailing.		Steam.		Total.		Value of Cargoes.
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	
British	...	...	81	98,119	81	98,119	£ 288,450
Austrian	...	...	57	52,532	57	52,532	104,800
Italian	1	307	7	10,432	8	10,739	81,700
French	...	...	8	10,060	8	10,060	29,850
Greek	12	3,045	28	7,763	40	10,808	...
Turkish	97	11,000	77	28,500	174	39,500	197,300
German	...	...	8	10,258	8	10,258	...
Others	...	...	3	2,897	3	2,897	...
Total	110	14,352	269	220,561	379	234,913	652,100
„ for the year preceding ...	56	7,322	298	260,307	354	267,629	527,900

RETURN of British Shipping at the Port of Varna during the Year 1893.

Direct Trade in British Vessels from and to Great Britain and British Colonies.

Entered.						Cleared.					
Total Number of Vessels.			Total Tonnage.			Total Number of Vessels.			Total Tonnage.		
With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.
45	...	45	51,934	...	51,934	45	45	51,934	1,065	...	...
			£								
			246,190								

Indirect or Carrying Trade in British Vessels from and to other Countries.

Entered.						Cleared.							
Countries whence Arrived.	Number of Vessels.			Tonnage.		Countries to which Departed.	Number of Vessels.			Tonnage.		Number of Crews.	Value of Cargoes.
	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.		Total.	With Cargoes.	In Ballast.	Total.	With Cargoes.			In Ballast.	Total.
Constantinople ...	...	37	37	45,685	45,685	...	12	...	12	13,615	...	278	109,900
Batoum ...	...	1	1	500	...	...	25	...	25	82,070	...	616	191,650
...	...	...	...	500	...	...	...	1	1	...	...	500	...
Total ...	1	37	38	500	46,185	...	37	1	38	45,685	500	46,185	294,550

ROUSTCHOUK.

Mr. Vice-Consul Dalziel reports as follows:—

Trade bad. Reasons.	The trade of the district of Roustchouk during the year 1893 must be described as bad; the falling-off results from (1), the increased stringency and long duration of quarantine regulations in the second year of a cholera scare; (2), the low prices of cereals, the mainstay of the country from which the bulk of the people derive their income, and of course their capacity to buy foreign merchandise; (3), the continuing emigration of the Mussulman population, who have always been the best buyers of Manchester goods; this emigration is a source of serious concern to the Government, as, in many cases, it cannot induce the christian population, which is rapidly increasing, to occupy the lands left vacant, that is to say, when, as often happens, there is a want of water.
Mussulman emigration.	
Cardiff coal. Imports increasing.	The imports of coal continue to show a great increase: Cardiff coal for public consumption being 4,581 tons in 1893, against 1,571 tons in 1892, against 934 tons in 1891; no doubt this trade was a little overdone last year, as most of the importers have stocks left over from the winter, whereas there was scarcely a ton left anywhere after the winter of 1892-93; but at the same time the consumption is increasing and must continue to do so.
Manchester goods: conflicting results.	The importation of Manchester goods shows contradictory results; on the one hand yarns show a diminution of about 15 per cent.; on the other, prints and plain cloths an augmentation of about 15 per cent.; this trade, however, is getting more into the hands of natives, and consequently my statistics, which I can only get from British houses, are not so reliable as formerly.
Building.	A good deal of building has been going on, and the desire to have handsome shops and houses seems to be rapidly increasing. The local stone is not very good, but being easily worked, is capable of making handsome façades, and it is always backed with brick to keep out damp. The buildings are mostly roofed with tin-plate or sheet-iron of some sort; these are articles of British production, but I regret to say that the quality of the former is not now so good as it used to be.
Tin-plates and sheet-iron.	
Tiles.	Local tiles are still used but they are not good, and many people have tried French tiles, but not very successfully; Austrian tiles seem to keep out the rain and snow better. Under these circumstances it seemed to me that there is a large field for the numerous terra-cotta articles now produced in Britain, and I wrote to several manufacturers for prices current with the idea of getting some local man to take up the agency; unluckily, however, all these articles are made to scales of inches, and prices are quoted by feet, inches, squares, or some other unknown measure, while the weights are in tons, cwts., lbs., and the money in <i>l. s. d.</i> , while people here use the metric system, and the result is that I have not yet found anyone with patience enough to think the enterprise worth his trouble; and any flooring tiles, roofing tiles, or terra-cotta ornaments have up till now been furnished by Austria, where also the metric system
Difficulty in translating weights, measures, &c. Metric system.	

of weights and measures is used, as, indeed, it is in Germany, and almost everywhere in the world except the United Kingdom.

The mere calculation of money does not so much matter, for it is necessary in every case to make some calculation of exchange; but the transmutation of our heterogeneous weights and measures into something understandable is a most serious question and causes us very great prejudice.

The spirit of joint stock association has evidently taken deep root in Bulgaria; last year I mentioned the Roustchouk Fire and Life Assurance Company as having made a good start in 1892; in 1893 it appears to have done still better, as according to the balance sheet the net profits were 10,000*l.*, and the dividend paid 7,200*l.* or 12 per cent. on the share capital of 60,000*l.* Such undertakings have a great advantage in this country over similar ones in Britain, in that they employ their disposable funds at 7 per cent. to 10 per cent. with perfect ease and good security.

Joint-stock
enterprise.
Assurance
company.

A small banking company named the "Girdap," although really much older as an association, is only now coming into prominence, because of its peculiar system of obtaining a capital which is only now bearing fruit. Originally established in 1882, exclusively as a savings bank with a capital of 400 shares of 10 fr. (8*s.*) or 160*l.*; each shareholder had further to pay 2 fr. (1*s.* 6*d.*) per month. It was recognised in 1887 with capital of 1,000 shares of 1,000 fr. each nominal (40*l.*), but only 100 fr. per share (4*l.*) paid up. All profits are carried to capital account, and, in addition, a monthly subscription of 2 fr. (almost 1*l.* per annum), had to be paid for each share up to 1890; in 1891 it was 4 fr. (almost 2*l.* per annum); in 1892 and thereafter the monthly subscription has been at the rate of 5 fr. (4*s.*), with the result that at December 31, 1893, the paid-up capital, including profit not distributed, stood at 512,828 fr. 85 c., or say 20,513*l.*, out of the total nominal capital of 40,000*l.* which had been subscribed in 1887.

Girdap Bank.

At the rate which has hitherto prevailed of 2*l.* 8*s.* per share, plus profits of say 12 per cent., it is pretty certain that the whole capital will be paid up in 1897, and, thereafter, the profits, whatever they are, will be distributed to the shareholders instead of carried to capital. The success which has attended this small bank has induced people in other towns to follow its example, and, I believe, several banks are now in formation based on the same principles.

The following are the official statistics of exports and imports at each of the ports in this consular district during the year 1892:—

TABLE of Imports at the Various Ports of Bulgaria, comprised in the District of the Roustchouk Vice-Consulate for the Year 1893.

Customs Category.		Widdin.	Lom.	Rahovo.	Nikopol.	Sistov.	Roustchouk.	Tutrakan.
		Head.	Head.	Head.	Head.	Head.	Head.	Head.
		200	9	...	8	98	79	2
		Tons cwts. qr.	Tons cwts. qr.	Tons cwts. qr. lb.	Tons cwts. qr. lb.	Tons cwts. qr.	Tons cwts. qr.	Tons cwts. qr.
1. Living animals	...	...	...	...	...	...	...	...
2. Estates, produced from animals	...	...	...	...	...	...	...	...
3. Cereals and their products	...	...	...	...	...	...	...	...
4. Fruits, vegetables, oil seeds, &c.	...	...	...	...	...	...	...	...
5. Colonials	...	...	...	...	...	...	...	...
6. Spirits	...	...	...	...	...	...	...	...
7. Preserved provisions, jams, &c.	...	...	...	...	...	...	...	...
8. Manure and refuse	...	...	...	...	...	...	...	...
9. Combustibles	...	...	...	...	...	...	...	...
10. Chemicals	...	...	...	...	...	...	...	...
11. Mining stuffs, colours, &c.	...	...	...	...	...	...	...	...
12. Resins, mineral oil, glue, &c.	...	...	...	...	...	...	...	...
13. Oils, fats, wax, and their products	...	...	...	...	...	...	...	...
14. Drugs, &c.	...	...	...	...	...	...	...	...
15. Pottery...	...	...	...	...	...	...	...	...
16. Stones, earth, glass, and their products	...	...	...	...	...	...	...	...
17. Metals and their products	...	...	...	...	...	...	...	...
18. Raw materials for wood carving and working	...	...	...	...	...	...	...	...
19. Paper and stationery	...	...	...	...	...	...	...	...
20. Textiles and their products	...	...	...	...	...	...	...	...
21. Textiles, clothing, hats, &c.	...	...	...	...	...	...	...	...
22. Carriages and its products	...	...	...	...	...	...	...	...
23. Carriages, wagons, &c.	...	...	...	...	...	...	...	...
24. Machinery, instruments, &c.	...	...	...	...	...	...	...	...
25. Quincaille, jewellery, &c.	...	...	...	...	...	...	...	...
26. Quincaille, pictures, stationery, &c.	...	...	...	...	...	...	...	...
27. Sundries	...	...	...	...	...	...	...	...

* Under head 27 are now comprised arms and ammunition and salt, the latter forming the bulk of the imports.

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1894.
ANNUAL SERIES.

N^o. 1425.

**DIPLOMATIC AND CONSULAR REPORTS ON TRADE
AND FINANCE.**

BRAZIL.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF RIO GRANDE DO SUL.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1263.

*Presented to both Houses of Parliament by Command of Her Majesty,
JULY, 1894.*

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BRAZIL.

RIO GRANDE DO SUL.

Consul Hearn to the Earl of Kimberley.

My Lord, *Rio Grande do Sul, April 30, 1894.*

I HAVE the honour to transmit, herewith, my Report on the Trade and Commerce of the State of Rio Grande do Sul, as well as one from Mr. Vice-Consul A. Archer on that of the Vice-Consular District of Porto Alegre for the year 1893.

I have, &c.

(Signed) WALTER R. HEARN.

*Report on the Trade and Commerce of the Consular District of
Rio Grande do Sul for the Year 1893.*

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TABLE OF WEIGHTS AND MEASURES AND CURRENCY.

1 kilogramme	= 2·2046 lbs. avoird.
1,000 kilogrammes	1 ton.
1 arroba	32·379 lbs.
1 alqueira	825 bushel.
1 kilometre	·621, or about $\frac{1}{2}$ mile.
1 milreis = 1,000 reis	{ par value, 2s. 3d. exchange value, about 10d.

NOTE.—The amounts in sterling are converted at the rate of 1s. per milreis.

Introduction.

The Civil War in the State of Rio Grande do Sul which convulsed all classes during nearly the whole course of the year 1893, had a most disturbing influence on trade and commerce, an influence which it is not possible to calculate but which was none the less apparent.

The depression was perhaps not so marked in the direct business of the seaport towns, at any rate during the earlier half of the year, but the trade between those towns and those in the interior was brought almost to a standstill, and importers had to restrain their transactions to purely local consumption.

In the first six months, however, trade was not so much disturbed and may perhaps be considered normal, for exports were better than in previous years; but during the last half of the year almost nothing was done in imports, and the employés in the custom-house and in many houses of business found it difficult to fill up their time.

On two occasions, in July and September, no private or commercial telegrams were allowed to pass, and when this embargo was taken off, the use of codes was absolutely forbidden, and commerce was thus put to abnormal expense and much inconvenience.

In these days nearly all business transactions are negotiated and concluded by telegraph, and it is most essential that telegrams should be as free, private, and inviolable as letters sent through the post.

In Mr. Vice-Consul Archer's report, which is hereto appended, he gives an interesting review of commercial affairs at the capital of this State.

In anticipation of a period of peace, which it is to be hoped this State will before long enjoy, I have sketched a map showing the means of communication in this and the surrounding States, in the hope that it may be useful to, and encourage the sending out of, travelling agents of British commercial houses.

I would once more call attention to the importance of commercial agents sent to South America being conversant with the Spanish or Portuguese language, and also to the necessity for trade journals, catalogues and price lists being printed in one of those languages, or at any rate in French, as the English language is far less spoken in South America than in any other part of the globe, and business men simply put aside commercial publications in a language they cannot understand. For this reason publications like "El Guardian Mercantil," published in Spanish at 21, St. Helen's Place, London, in the interests of British trade are worthy of support and emulation.

Commercial
travellers and
trade
circulars.

It is probable that a new era of commercial prosperity will follow in the steps of peace, and that a greater demand for European goods than ever will arise. This country is very far from self-supporting as yet, owing chiefly to the want of energy in the natives. It is a country which may be made a pastoral and agricultural paradise.

Millions of cattle roam grazing over the prairies, yet milk is sold at 6*d.* a bottle, butter is imported from Europe, and decent cheese is unknown.

There are thousands of acres fit for growing wheat and barley, yet all breadstuffs and malt are imported, and while grapes, oranges, and most other fruits grow in extraordinary profusion still nearly all the wine and preserves come from Europe.

The pastoral and agricultural lands of Rio Grande do Sul are, I am confident, equal, if not superior, to the best parts of Argentina.

Trade and Commerce.

The prevailing low rate of exchange favoured the products of local industry already established, although it taxes the resources of new enterprises which have to procure machinery and other necessities as well as skilled labour from Europe.

Local
industries.

A new cotton mill is being built on the outskirts of the town by an Italian firm, and is, I believe, to be on a very large scale. I understand that it is being erected in the place of a similar enterprise discontinued in Italy.

It will add considerably to the manufacturing importance of the town, and will doubtless, to a certain extent, enter into competition with the "Union fabril e pastoril."

This latter company did well as usual in 1893, and, notwithstanding a difficulty in procuring raw material when it was wanted, owing to deficient steam communication with this port, they were fully occupied the whole year and declared a satisfactory dividend.

(1802)

A 3

They, at the same time, put aside a considerable sum to form a pension fund for their labourers and employés, many of whom are also given a direct interest in the produce of the mills.

The soap and candle company were obliged to suspend operations, as well as was the Companhia Oriental fabril e agricola.

The former company will doubtless begin work again when it has been reconstituted, but the latter company has, I believe, little hope of doing so.

The flour mill is completed and nearly ready to begin work, but there seems to have been difficulty in calling up the capital, and it is doubtful if the company will have sufficient left to begin work on the scale necessary to ensure success.

Flour mills are almost the only factories which do not enjoy the advantages of protection in this country, and American flour is imported free of duty, and that from other countries at a small duty of 10 per cent. ad valorem, so that this mill will have to compete with foreign flour as well as with the flour mills of Rio de Janeiro and Pelotas, which after years of uphill work have managed to weather the storm although they now work for very small profits.

Under the Convention with the United States of 1891, flour from the United States is admitted free into Brazil. It appears, however, that certain custom-houses have been charging an expediente duty of 10 per cent. on American flour to the extent of some 3,000,000 milreis (150,000*l.*).

American
Reciprocity
Convention.

An advocate of Rio de Janeiro, Dr. Albuquerque, learning this, has, it appears, taken the Convention under his charge with the object of interpreting it from his point of view to the Brazilian Government, and, after making contracts with all import merchants to give him 30 per cent. of any duties they may have refunded to them, having shown that this 10 per cent. duty on flour was illegal and must be repaid, to which apparently the Government has conceded, he now proposes to prove that the Brazilian Government bound itself in the Convention to allow certain percentages to American goods off the tariff then in force, and that to have increased that tariff by 60 per cent. in 1892, and to propose to increase it by 30 per cent. more in 1894, so far as America is concerned, is illegal according to the Convention, and that all American goods which have been charged with the additional 60 per cent., or may be charged with the 30 per cent. additional in 1894, have been and will be wrongly taxed, and that, therefore, the immense sum thus wrongly collected by the Government must be repaid to the merchants, who will give the advocate 30 per cent. of what they receive, and justice will be done to the United States by allowing their goods to be imported 85 per cent. cheaper than those of other countries in 1893, and 115 per cent. in 1894.

Trade has been so restricted and uncertain during 1893, that, no statistics being obtainable, it is impossible to say whether Great Britain has maintained her position as an exporter to Brazil, but I think she has, and the trade with Great Britain has been fairly regular.

There is another factor at work, however, besides the before-mentioned Reciprocity Convention, which will sooner or later affect trade, and that is the diversion of the steam shipping trade with this State to Hamburg. German goods can hardly fail to creep into those steamers in the place of British goods as time goes on.

Yet another cause must be found in strikes. We lately saw the anomaly here of a British ship arriving from Bremen with a cargo of German coal, due, doubtless, to the late coal famine in England. A fact like this is well worth the attention of the strikers.

Notwithstanding the Civil War in the State which must have greatly reduced the productiveness of the country, in the absence of custom-house statistics, banking transactions show that the export trade of the State was much greater in 1893 than in 1892, and, therefore, it is evident that, had the State been at peace, the past year would have been an abnormally rich one.

This applies more particularly to Porto Alegre where the German and Italian colonists have been producing all they possibly could, and obtained very high prices for it, thus realising the truth of the adage, "Ill blows the wind that profits nobody."

During the latter part of the year the exportation became greatly restricted owing to the laying up of Brazilian shipping.

The cattle "saffra," or harvest, of 1893, began very badly, and, in fact, it appeared at first as if no troops of cattle would be sent to Pelotas owing to the long and severe drought which prevailed all over this State and Uruguay.

However, later on, they began to come in, and, as time went on, the number increased, so that when the killing season ended in June the number of cattle killed equalled that of 1891, viz., 450,000. Of these 326,000 were slaughtered at Pelotas, the remainder being divided between Quarahuir, the Paradaõ Company, and the Bagé Xarqueada.

TABLE showing the Result of the whole Cattle Industry of this State for the Years 1892-93.

Articles.		Exported to—	Quantity.	
			1892.	1893.
Cattle killed	...	June 30, 1893...	485,000	450,000
		December 31, 1893—		
Salted hides	...	Europe	490,343	445,666
Dry hides...	...	Europe	167,847	128,494
	...	United States	13,266	3,172
Dry horsehides	...	Europe	1,685	3,323
Horns	...	Europe	1,318,142	945,189
Hornpiths	...	Europe	531,944	343,500
Bones	...	Europe	834,526	1,518,959
Calcdned bones	...	Europe	...	96
Bone ash	...	Europe	4,559	5,308
Wool	...	Europe and United States	2,082	845
Hair	...	Europe and United States	851	420
Tallow—				
Hard	...	Europe and United States	2,620,852	1,527,122
Soft	...	Europe and United States	1,916,763	1,065,742
Xarque, dried beef	...	Brazil	28,753,812	24,474,077

The "saffra" for 1894, contrary to expectation, has begun well in spite of the Civil War in this State, the troops of cattle having been respected by the armies of both parties and allowed to pass freely. Thus up to March 13 the number of cattle sold at the Tablada (cattle market) of Pelotas is 104,501, the number to the same date in 1893 being 101,255, and in 1892, 166,080.

Banking.

Like other branches of commerce the banks had a very stagnant time during 1893, and the three existing banks were doubtless fully sufficient for the trade of the city, the Paris and Rio Bank having closed its branch here for want of custom.

The amount of money, however, which passed through the banks to and from abroad was considerably greater than in former years, showing that the export trade was flourishing although the import trade was very dull.

The national banks cannot have been satisfied with the security of the times to embark largely in commercial speculations.

Exchange.

The Brazilian currency showed no signs of regaining its former exchange value in 1893, and indeed, starting at a value of 1s. 1½*d.* in January, the milreis fell in February to 1s. ¾*d.*, in March to 1s. ½*d.*, in April to 11¼*d.*, in May to 10¾*d.*, being on some days in June quoted at 11*d.*, it fell again to 10¾*d.*, at which rate it remained until Admiral Wandenkolk's attempt on the town on July 8, when for some days the banks had no rate.

On July 21, however, the banks opened with an exchange rate of 11*d.* which rose to 1s. on the last day of the month and to 1s. ½*d.* on August 2, remaining fairly stationary until September 6, when the outbreak of the naval revolt brought it rapidly down to 11*d.* and later on to 10½*d.* There were slight fluctuations in exchange until it touched 10½*d.* at the end of November, and varied between that rate and 10*d.* to the end of the year.

Considering the state of the country it was surprising that the course of exchange maintained even the position it had, but I presume the reason to have been that the country entered on its most disturbed state simultaneously with the shipping season of the coffee crops which latter always cause the rate of exchange to rise above the ordinary course of the year.

So far as one can anticipate such an uncertain thing as exchange, even now that peace is more or less restored, it appears as if it would be a long time before the milreis will be quoted so high as or higher than 1s.

Shipping and Navigation.

The number of British ships entered in the direct trade in 1893 was 16 or 7 below the previous year, while the direct tonnage entering the port was 9,309 tons, being 2,311 tons more than in 1892. British shipping.
Direct trade—
Entered.

The British vessels which cleared for the United Kingdom and British colonies was 32 or 6 more than in the previous year, while the tonnage was 8,774, being an increase of 620 tons over 1892. Cleared.

Of these vessels 21 with a tonnage of 6,490 tons cleared to Barbados in ballast.

The number of British vessels entered in the carrying trade was 75 against 77 in 1892. The tonnage amounted to 35,347 or 15,844 tons less than in 1892. Carrying trade—
Entered.

The vessels cleared in the carrying trade were 62 against 65 in the previous year. The tonnage was 34,943 register tons or 14,142 tons less than in 1892. Cleared.

Of the British vessels entered in 1893 from foreign ports, 19 brought salt from Brazilian ports, 7 brought salt from Cadiz, 8 brought flour, kerosene and timber from the United States, 22 brought flour and general goods from Argentina and Uruguay, while 6 big steamers came with general cargo from Antwerp.

The falling off in the number of direct vessels from the United Kingdom is partly due to the disturbed state of the country, and partly, I believe, to cheaper freights having been taken by Norwegian and German sailing vessels, while the falling off in the general tonnage is owing to the fact that hardly any railway material for the Government railways was imported.

The steamship competition by German lines announced in my report for 1892 (No. 1263) has had, so far as can be seen, disastrous results to British steam shipping to this port and the South of Brazil. Steamship competition.

The two German lines have now combined as to rates of freight and agents, and have sent out here four huge lighters capable of carrying 600 tons of cargo each and a powerful steam tug to tow them on the lake to and from Porto Alegre. One British steamer came out in competition in 1892, and, I am informed, was a financial success, but it was not followed by others, and the result has been that the trade has been diverted from Liverpool to Hamburg, and it is very doubtful whether that port will not in the future hold the entire Southern Brazilian steam traffic.

When the revolution, which broke out in September, compelled the entire Brazilian Merchant Fleet to remain idle in port, I felt certain that this coast would, in a few weeks, be served by a mass of steamers under the British flag, and that they would find an opening into Brazilian trade which would last long after peace was restored.

Such, however, has not been the case, and beyond the entrance into competition of a very mild nature with the German steamers which are now carrying on the Brazilian coasting trade, of four

British steam lighters from the River Plate, no steamers under the British flag have appeared, and although one steamer of an influential line is, I believe, on her way here, I am informed she has been so badly supported by shippers that no more of the same line are likely to follow.

The steam trade with South Brazil is one of growing importance, and one which might have been easily held with energy and determination, such as has been shown by the German companies when they found that British shipowners were apathetic and careless.

I remember some years ago a case in the north of Europe, when new comers threatened to compete with British steamers in the trade of the country, the British shipowners ran their steamers carrying goods for nothing until the competitors were beaten off and the British Company has held the trade ever since.

It is to be regretted that there have not been found British shipowners in the present instance to carry out some such determined policy, and, although it would be now uphill work, I do not believe it is yet too late to regain much that has been lost, and perhaps more.

I can state this with greater confidence since it is evident that the intention of the Brazilian Government to restrict the coasting trade to the national flag, a decree to which effect was to come into force in 1894, must be postponed for many years.

Current events must have greatly prejudiced even the richest Brazilian steamship companies, and many national vessels have been transferred to foreign flags, and others destroyed, so that the Brazilian Merchant Fleet will have much to do before it can regain the position it held at the commencement of 1893.

Wrecks.

Two British sailing vessels were lost on this coast during 1892, both within a few miles of one another on the Albadaõ coast, in latitude 33 degrees south, where, owing to inshore currents, so many vessels have been lost.

These were the "Moss Rose," of St. John's, N.B., and the "Chasca," of Liverpool. Both were bound to the River Plate, the former from New York with a general cargo, and the latter from Santos in ballast. From inquiries held it was evident that the former vessel was lost from causes beyond the control of the crew, while the master of the latter vessel was out of his reckoning owing to want of care in navigation, and consequently his certificate was suspended for 6 months by a naval court.

Seamen.

The number of seamen in British vessels which visited this port in 1893 was 936, against 1,150 in 1892.

There was a decided improvement in their conduct while on shore, fewer desertions and less trouble with the boarding-masters.

I always find that seamen on vessels where their comforts are considered, and strict discipline enforced, behave themselves better on shore than those who are allowed to take care of themselves as best they can and to do as they please.

There is one point that has struck me in connection with seamen and life on board ship, and that is the not infrequent cases in which seamen who die receive no decent religious burial.

Some vessels cannot even boast a prayer book on board, and when a seaman dies he is sown up and shot overboard, often without even the crew being mustered to pay silent respect to their comrade as he is launched into the deep.

I would call the attention of our great religious societies to this in the hope that something may be done to provide the cabin and "fo'c'sle" of every British ship which leaves the United Kingdom with bibles and prayer books.

In long weary hours off watch they would be very welcome if only for the reason that there was no other pastime, and seeds of good would inevitably be sown.

There were fewer cases of dispute as to payments of freight brought to my notice in 1893 than in previous years, although one rather ludicrous case deserves notice. Disputes and payments of freight.

A shipmaster reported to me that a merchant refused to pay his balance freight unless he waived his right to 200 milreis demurrage. I suggested arbitration, and the shipmaster went away apparently to arrange the matter by that means.

Some days later I learnt that the shipmaster had gone straight to the merchant and offered him 50 milreis off the freight, which had been accepted and he was at once paid the 200 milreis demurrage and the freight less 50 milreis!

In my report for 1892 I stated that two British shipmasters had been obliged to experience all the inconveniences of seeking justice from the law courts. Litigation.

This they still continue to do. The first vessel entered this port in November, 1892, and legal proceedings commenced soon afterwards. Every case and every appeal has been won by the vessel and still the master remains here after 17 months unable to get anything of the freight, damages, demurrage, &c., awarded by the courts, except a few days' demurrage, a fresh case having to be instituted to get the rest.

The other vessel has gone away, leaving a power of attorney behind her, but her cases have now been before the courts for more than a year.

The reason for this delay of justice appears to lie in the apparently unlimited right of appeal and in the immense time allowed to judges to deliver their judgment.

There appears to be some dissatisfaction among shipmasters as Tugs. to the steam-tug service at the bar and on the lake.

There are only two decent tugs, and they are not powerful enough for the size of vessel that comes to this port now, and they are insufficient in number for the shipping of the port. Moreover, having combined as to the rates of towage which they demand in advance on vessels leaving the port, they often keep a vessel waiting many days which has paid her outward towage while they are earning fares either towing in over the bar or to and from Pelotas.

Quarantine.

During the yellow fever season at Rio de Janeiro and Santos vessels coming from thence are subject to detention in quarantine and fumigation, or if there are suspected cases of sickness on board the vessels are detained until the cases have been removed to the lazaretto.

I am informed by the medical inspector of the port that it is intended, when the country has resumed a peaceful condition, to establish a regular quarantine station, to which the passengers of suspected vessels will be removed and detained for a certain period.

These South-American quarantine stations are a great obstacle to commerce, and are a source of far more discomfort and expense to travellers than is compensated for by the good they may do.

They are, as a rule, nothing but wretched hotels placed in desolate, almost inaccessible spots, far from the haunts or markets of men, and filled with compulsory guests.

They are either carried on by the Government or farmed out, and in either case the primary object is to make them paying concerns.

All sorts and conditions of men are huddled together in the rough barracks, and are forced to spend weary days and nights in unchosen company, and to pay famine prices for accommodation and food far inferior to that provided on the steamers.

It is, doubtless, right that in times of cholera and yellow fever epidemics, passengers by infected or suspected vessels shall be subjected to quarantine for the good of the nation they are going amongst, but epidemic or no epidemic the hotels and their staffs must be kept up, and it is, therefore, usual to abuse the just object of quarantine by forcing shiploads of passengers to involuntary exile on desert islands and places, when they have come from ports perfectly clean or where only a few cases of disease have been reported.

The horror of the discomfort, delay, and expense prevents hundreds of business men from making journeys for commercial purposes which would result in an increase of trade to the country of vast sums.

The port of Rio Grande is in a temperate climate and very healthy, and yet it is seldom that anyone can go to the River Plate, 30 hours distant by steamer, without having to go through all the discomforts of a quarantine station, for a period varying from 2 to 10 days.

Those who are forced to travel from here to the River Plate prefer a 5 days' overland journey in a rough diligence, exposed to storms and floods and to uncomfortable sleeping stations rather than undergo the horrors of quarantine if they took the short steamer journey.

Disease can be kept out of a country without these excessive measures, if only the medical and sanitary authorities are competent and energetic.

During the year 1893 all ports in England and Wales were considered infected with cholera by the Brazilian authorities for some time, and sailing vessels which sailed with clean bills of health given by Brazilian consuls, although from 46 to 80 days on the voyage, were obliged to call at Ilha Grande in latitude 23 degrees south to perform quarantine, and if they did not call there they were sent back there from Rio Grande in latitude 32 degrees south or from Pernambuco in 8 degrees south before being allowed to enter the port.

It is I believe impossible for a sailing vessel, with no disease on board, to bring cholera from Europe to America, and yet these vessels are constantly subjected to delay in going to Ilha Grande, which in many instances must cost the vessel from 100% to 200%, when they might be effectually fumigated as a precautionary measure at their port of destination.

Yellow fever takes 10 days or less to show itself, and many cases have occurred in Rio Grande of persons landing after a few days' voyage from Santos or Rio de Janeiro being attacked by the tenth day on land, but the disease has never spread or shown itself either infectious or contagious in this climate.

It is urgently needed, therefore, that a quarantine station should be erected at this port for passengers from vessels arriving from ports where the disease is epidemic, but it should not be expected to pay expenses, and if justly and wisely used will probably prove a blessing, and by doing away with the necessity of calling at Ilha Grande will save vessels much loss of time and money.

A quarantine station, however, which is run as a paying business, cannot but prove a nuisance and a burden to the travelling public and the country itself, on account of the commercial agents it keeps out of the country and the delay and expense it imposes on ships and commerce.

Public Works.

The condition of the Rio Grande bar during 1893 fully upheld the improvements which have steadily taken place since 1889, and at present it is no obstacle to any ship which can float in the waters inside. ^{State of the bar.}

It is now necessary that the Bar and Port Commissioners should steadily dredge the harbour of Rio Grande and the channel leading to it to a depth of water equal to that on the bar, in order that vessels which cross the bar may forthwith enter the harbour without the delay and expense of lightening at S. José do Norte. They have several steam dredgers, suckers, and other machines at work, so that with system and energy at no distant date vessels drawing 15 feet of water should be able to come right up to the Rio Grande custom-house or the quays, and discharge or take in their cargoes alongside them.

At present vessels drawing over 11 feet of water must lighten down to that draught at S. José do Norte, and then enter the har-

bour, or, if outward bound, complete their cargoes there after loading to that draught at Rio Grande.

The question of the Bar Improvement Works with the Société Franco-Brésilienne has at last been decided. The contract has been rescinded, the Government has taken over much of the plant of the Société, and has instructed the Bar Commissioners to perform the works on the plans of the French Company's engineers.

It remains to be seen what the result of this will be, but previous attempts on the part of Brazilian engineers to improve the bar have hopelessly failed, and there must be a grave doubt in the meantime whether works which were to have been carried out and superintended by eminent European engineers of long and large experience in similar enterprises, will be successfully performed by Brazilian engineers without that special knowledge and experience.

The following table shows the daily soundings on the bar from 1889 to the end of 1893, and the improvement that has taken place and been maintained will be evident at a glance:—

Palms.	Feet.	1889.	1890.	1891.	1892.	1893.
25	18·2	..	..	1	..	..
24	17·6	..	..	15	2	1
23	16·8	..	..	16	3	17
22	16·0	..	..	49	87	107
21	15·3	..	..	28	54	63
20	14·6	2	1	71	105	74
19	13·10	37	16	53	53	34
18	13·2	84	58	49	19	1
17	12·4	73	107	20	5	2
16	11·7	60	84	14	1	..
15	11·0	37	36	8	..	..
14	10·2	16	20	2	..	..
13	9·6	9	8	..	..	..
12	8·9	2	..	..	..	..
11	8·0	2	..	..	..	..

The most frequent depth sounded in 1893 was 16 feet on 107 days, against 14 feet 6 inches on 105 days in 1892, the former being $1\frac{1}{2}$ feet more than the very highest water registered on three occasions in 1889 and 1890, and laying aside these three occasions when abnormally deep soundings were taken, and the 3 days in 1893 when abnormally shallow soundings were taken, the lowest water sounded in 1893 was the highest water sounded in 1889 and 1890.

Moreover, from notes made at this consulate of the soundings of British vessels when crossing the bar, including those made on H.M.S. "Beagle," both in entering and leaving the river, it is certain that there is, as a rule, 2 or 3 feet more water on the bar than is given in the official returns.

This erring on the safe side and the care taken by the pilots is by no means a fault, as it is very necessary to avoid all risks of



any vessel stranding on the bar as the passage might in that event be blocked up and all traffic would be stopped.

It is probably owing to the care and observation of the bar officials that during the 4 years I have been at this port not a single vessel has stranded on the bar, or been wrecked in approaching it.

During the year much progress has been made in replacing the old wooden beacons in the channel up the river to the port by massive iron structures and new buoys, which are provided with gas illumination, so that in the future the inner waters will be navigable by night.

In the channel leading over the bar of the S. Gonçalo River, the approach to Pelotas, 11 new buoys have been placed, six cylindrical, painted black, on the one side, and five on the other side, the first being conical and painted black, and the last cylindrical painted red in accordance with the rules of the International Maritime Convention of Washington, while in the Seitia Canal between S. José do Norte and the Pelotas bar, three cylindrical buoys have been placed on the one side, the first being painted red, and two cylindrical buoys on the other side painted black.

Railways.

The plan of the Southern Railway system of Brazil, which will, no doubt, be gradually carried out in the future, is described in a recent work* by Sr. Chrockatt de Sa, Inspector-General of Railways in Brazil, as follows, and, if studied in connection with the map appended to this report, giving railway, water, and diligence communication, will, I trust, especially when this country settles down to peace and work, be of service to commercial agents and travellers.

"The railway from Itararé to Santa Maria da Bocca do Monte was adopted as main line for the southern railroads, not only because it had been granted and contracted at the time when the commission was appointed and organised, but also because its plan and extension perfectly answer their purpose.

"This line, taking the general direction from north to south through the centre, that is from S. Paulo to Rio Grande do Sul, solves the problem of communication between these two States and those of S. Catharina and Parana, having besides the great advantage of connecting its northern extremity with the railways of S. Paulo, so as to unite with the general network of railways.

"But this line could not entirely answer the purposes for which it was intended, without being connected with the capitals of S. Catharina and Parana, and to the best seaports of these States.

"Only by means of these connections could the exigencies of the general administration of the Republic, regarding those two States,

* "Brazilian Railways, their History, Legislation, and Development," by Chrockatt de Sa, C.E., Inspector-General of Railways. Rio de Janeiro, 1893.

be attended to, nor could otherwise the defence of Rio Grande do Sul be guaranteed in case any interruption on the line between the Federal capital and S. Catharina or Parana should happen, a very possible occurrence on a line so extensive.

"The convenience of the industrial improvement of all the zone traversed by the main line, and, therefore, the economical conveniences of the central line, require all the aforesaid connections.

"In the long course of this system from S. Paulo to Rio Grande, there being only two outlets, one in each of these two States, the port of Santos and that of Rio Grande via Porto Alegre, the industrial development of the zone through would certainly be sacrificed on account of the charge for heavy freights, or else extraordinarily low tariffs would have to be adopted, to the detriment of the railway incomes, even considered within the narrow limits of a moderate interest on the capital of the enterprise.

"Hence the necessity of other outlets at intermediate points.

"For this purpose the commission indicated, for the State of Parana, the extension of the railway from Paranagua to Corityba as far as Ponta Grossa or any other point of the line which should be deemed preferable after having been surveyed.

"As to the State of Santa Catharina, considering the great difficulties to be met with and the enormous expense necessary to pass over the Serra Geral which, therefore, should be avoided as much as possible, the commission tried to organise the railway system of that State so as to pass over the said range of mountains only once, constructing branch lines below and in the higher regions.

"It is incontestible that the valley of Itajahy is the most suitable for the development of a railway running up the mountain, facilitating, by its natural position, branches to such points of the territory as are most likely to profit by them.

"On the other hand the port of S. Francisco presents the best conditions for the outlet of a general central line.

"Being so, a line seems of the utmost convenience from the port of S. Francisco, passing through the valley of Itajahy to the Serra Geral, thence running up the said mountains by means of a branch to Coritibanos or Lages, extending to the railway from Itararé to Santa Maria and having a branch to Desterro, on this side of the Serra Geral.

"The necessities of establishing communications between that capital and the political centre of the Republic will thus be satisfied.

"Besides, considering the profit to be derived on the marginal territory of the River Parana as to strategic views, and the necessity of turning to advantage the natural elements of riches there existing, finally, the establishment of international communication with Paraguay, the commission proposed the extension of the said line through Palmas as far as the mouth of the Chopim, on the Iguassu, where it will join the branch projected from Guarapuava to the mouth of the latter on the Parana.

"Finally, the commission thinking it convenient to establish a

second communication with Rio Grande do Sul which would be indispensable in possible cases of interruption on the central main line, proposed a branch from Coritibanos or Lages to Porto Alegre, through the plains of Vaccaria whence it could be extended to Passo Fundo, so as to be in direct communication with the central zones of Rio Grande and to open the way to Cruz Alta, a strategic point of the highest importance for the concentration of troops.

"The branches in the direction of the boundaries belonging to the Southern Railway system indicated in the project were those from Pelotas to Jaguarão, from Santa Maria to the Rio Negro through Bagé, from S. Gabriel or Cacequy to S. Anna da Livramento, from Cacequy to S. Borgia, from Cruz Alta to the Uruguay close to the mouth of the Píperi Guassu, and a branch from Guarapuava to the mouth of the Iguassu.

"These lines combined with the existing railways or with those which are going to be constructed, constitute a complete system by which the boundaries in the South can be defended, when necessary, both by occupying those which might require such measures and by the facility of transporting supplies of all kinds."

In this same chapter Dr. Sa in referring to strategic railways on the northern boundaries of Brazil remarks, "Having been informed that on the boundaries of Brazil with British Guiana the natives were taught English, and that accordingly they became identified with that nation, led also by recent events which showed clearly the ambitious intentions of European nations regarding territorial possessions, the commission accounts it as of the utmost importance the nationalisation of those remote regions as soon as possible, and most earnestly calls Government's attention to this point."

The year 1893 was undoubtedly the most remarkable in the history of the "Southern Brazilian Rio Grande do Sul Railway" for its ordinary traffic was greatly interfered with by the revolutionary state of the country, since it became the main strategic line of communication of the Government in this State and was of the greatest use in this respect. It suffered great damage to its permanent way and rolling stock by the enemies of the Government for the part it played as a base of operations against them, while it is only fair to state at the same time that they treated the personnel of the line who happened to fall into their hands with consideration and humanity.

Taking into consideration the adverse circumstances under which the line was worked in 1893, the figures with which I have been favoured by Mr. Duprat, the managing director, show very much better results than could have been expected or even hoped for, although they fall below those of 1892 in every respect, with the exception of traffic on account of Government, they are more satisfactory than those of some previous years when peace reigned in the State.

The number of passengers carried over the line was 108,512
(1802)

B

or only 8,783 less than in 1892, which must be considered a very small falling-off since the line was practically closed over half its length for 6 months of the year, while if we include the passengers carried on Government account in each year there is actually an increase of 5,000 passengers in 1893 over 1892. The revenue from the passenger service was, however, in 1893, 26,513 milreis (1,325*l.*) less than in 1892.

Again, although there is a falling-off in ordinary goods traffic in 1893 of 3,039 tons over 1892, there was, including goods carried in each year on Government account, an increase of 16,135 tons in 1893 over 1892.

From this it is evident that the main traffic of the line both in passengers and goods is between Pelotas and Rio Grande, which portion of the line was not interrupted for more than a few hours in 1893.

The following table shows the number of passengers and the goods tonnage carried over the line, not inclusive of Government traffic, since the opening of the line:—

Year.					Passengers.	Goods.
					Number.	Metric tons.
1885	..	..	..	..	86,149	16,093
1886	..	..	..	..	105,465	20,735
1887	..	..	..	..	95,659	21,736
1888	..	..	..	..	85,166	20,419
1889	..	..	..	..	70,444	21,139
1890	..	..	..	..	75,610	30,431
1891	..	..	..	..	86,853	33,360
1892	..	..	..	..	117,295	46,585
1893	...	..	..	..	108,512	43,546

The receipts in 1893 amounted to 747,258 milreis (37,360*l.*), being a decrease of 75,069 milreis (3,750*l.*) from the previous year.

The expenses were 931,329 milreis (46,560*l.*), or 99,460 milreis (4,970*l.*) more than in 1892.

A new system has been adopted of debiting the stores used at the current rate of exchange, so that while each department receives its due share of the loss by exchange there is now no separate item to show what that loss actually was.

There is, however, no doubt that the deficit in working the line is mainly due to the low exchange which ruled lower in 1893 than it did in 1892, when the loss laid to differences of exchange was 132,713 milreis (6,630*l.*).

So far as it is possible to compute it the loss by exchange in 1893 must have been about 320,000 milreis (16,000*l.*). If this, therefore, could have been wiped out, or the milreis had been at its old nominal value of 2*s.* 3*d.*, the gain in working the line would have been about 136,000 milreis (6,800*l.*).

The receipts for special trains and season ticket fell to less

than half of those for 1892, while there was a considerable increase in parcels, telegraphs, and sundries.

The principal increase, however, was in traffic on account of the Government.

This will be best seen from the following table:—

TRAFFIC on Government Account.

Description.		1893.		1892.	
		Quantity.	Amount.	Quantity.	Amount.
Passengers ..	Number..	11,639	Milreis. 37,795	4,540	Milreis. 19,498
Special trains ..	” ..	700	93,842	54	9,350
Parcels ..	Tons ..	95	5,256	54	3,887
Horses ..	Number..	332	899	119	263
Goods ..	Tons ..	27,555	67,638	8,426	85,924

The destruction to the railway property by the insurgent forces was very great, although it cannot be said that they wilfully destroyed more than was necessary to prevent the railway being used as a base of operations against them. Six iron bridges were either blown or thrown down, two locomotives derailed, one being thrown down an embankment, many trucks burnt, miles of telegraph wires and posts destroyed and the telegraph instruments taken away from the stations. Yet it was noticed that whenever a bridge was thrown down the rails were taken up for some distance on either side to prevent the possibility of a train falling into the abyss.

The actual cost of repairs which have as yet been carried out of the damages is for permanent way, 25,226 milreis (1,261*l.*); repairs to wagons burnt, 1,628 milreis (81*l.*); and repairs of electric telegraph, 3,203 milreis (160*l.*); but this does not include ironwork of bridges, locomotives, &c., damaged, or telegraphic instruments stolen.

The deficit of 1893 eclipses all those that have gone before, but it must be remembered that the line has had two adversaries to combat, the revolution and the low exchange.

The former has diminished the amount of the receipts and the latter has taken away from their value, and it must be remembered that, while the price of every article used on the railway has more than doubled in cost, and salaries and wages have had to be largely increased on account of the depreciation of the currency, no increase has taken place in passenger or goods freights.

In connection with the Southern Brazilian Railway a small line, 18 kiloms. in length, is worked to a sea-bathing establishment on the sea coast. The hotel and houses there are full of visitors from Christmas to Easter, but during the remainder of the year it is seldom visited, and a train runs but three times a week. During (1802)

Sea Coast
Railway

the season, however, there are several trains a day, and the number of passengers carried in 1893 was 34,150 in addition to 125 season tickets.

Of parcels and baggage 224 tons were carried, and of goods 4,200 tons. The total receipts of the line were 49,376 milreis (2,469*l.*), while the expenses were 55,410 milreis (2,770*l.*).

It is, however, certain that in 1894 the traffic will have increased so much that the receipts will surpass the expenses.

Porto Alegre
New
Hamburg
Railway.

To Mr. William Tweedie, A.M.I.C.E., the superintendent of the Porto Alegre New Hamburg Railway, I am indebted for the following information:—

The traffic receipts for the year ending December 31, 1893, show a gross increase of 24·71 per cent. over the year 1892. From passenger traffic there was an increase of 28·62 per cent., and from goods and miscellaneous of 20·77 per cent.

The increased receipts are due chiefly to the higher rates and fares which came into operation in April last, but the full effect of which has not yet been experienced, owing to the check given to commerce by the partial closing, through the war, of the coast ports. This has resulted in a falling-off in the staple colonial produce, but building operations having continued to progress in all parts of Porto Alegre, the carriage of building materials has continued active throughout the year, while the high price of fuel has caused a development in the carriage of firewood, which formerly would not bear the cost of transit by rail.

The result of the passenger traffic has been satisfactory, notwithstanding a decrease in the number carried, due to the increase in the fares.

The war operations have not so far seriously interfered with the districts served by this railway, and if these districts continue to remain outside the sphere of active military operations, a considerable expansion of traffic may be anticipated with the cessation of hostilities and the full opening of the coast ports.

The expenditure account shows an increase of 13·5 per cent., due to increased cost of material and stores, advances in wages necessitated by increasing cost of living and to the low rate of exchange, these adverse influences having been aggravated by the continuance of the war.

It was the original intention to extend this railway right into the colonial districts. At present it stops short at New Hamburg, and in consequence, colonial produce has to be conveyed by wagon and pack mules for long distances over the roughest of roads to the railway.

Notwithstanding these drawbacks, the traffic receipts per kilom. are far higher than any other line in this State, and were the original intention carried out and the line extended into the prosperous colonial districts, there is little reason to doubt that it would become quite independent of the aid it at present receives from the State Government in the shape of guaranteed interest.

Efforts have been made to promote this extension, to the importance of which the State Government is fully alive, but the

Civil War has unfortunately put an end for the present to any hopes in this direction.

The following are the figures for 1893-92 :—

		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			Reis.		Reis.
Receipts, per kilometre	...	...	6,173\$726	...	4,950\$292
" " mile	...	...	9,924 121	...	7,957 479
Miles run	... Number ...	43,832	...	46,343	...
Passengers carried	... " ...	64,867	...	71,851	...
Merchandise	... Tons ...	20,098	...	21,246	...
Miles open	... Number ...	26½	...	26½	...

Public Health.

The health of the city of Rio Grande do Sul was, on the whole, more satisfactory in 1893 than in the previous year.

The authorities woke up to the fact that much might be done to improve the cleanliness of the city and of the people, and the results of the steps taken in that direction became at once apparent.

It is not easy, however, to enforce improvements without opposition, and a very laudable order of the Intendente forbidding the opening of the coffins and exposure to public gaze in the churches and cemeteries of the corpses of persons who have died, as has hitherto been the custom, has met with unwise, but happily ineffective opposition on the part of the Roman Catholic clergy.

The number of persons who died in the city in 1893 was 979, or 49 per 1,000 of the population, which shows an improvement over 1892, when the death rate was 53·6 per thousand.

The number of deaths from small-pox was 121, being 39 less than in 1892, when 160 persons died.

In 1893, 198 persons were admitted to the Pelotas Small-Pox Hospital, of whom there died 61, while 130 were cured. Of these, 76 were males and 122 females; 48 were whites, 85 mulattos, and 65 negroes.

The total expenses of the hospital for the year were 21,328 milreis (1,066*l.*), or per patient, 109 milreis (5*l.* 9*s.*).

Considering that Pelotas has quite double the population of Rio Grande, the small-pox was far more fatal in the latter city.

Owing to the recent death of the Sanitary Inspector, I have been unable to obtain statistics which would have made this portion of the report more valuable and interesting.

Immigration.

Immigration from Europe has been on so small a scale during the past year that it hardly deserves notice, except to show how the Government immigration schemes have failed. So far as this (1802)

part of the State is concerned, only 289 persons have sought work when they did not find Porto Alegre or the colonies suit them.

The returns of the Immigration Office of the city of Rio Grande give the following figures relating to the immigrants who came over the Rio Grande do Sul bar in 1893.

The total number of immigrants were:—

Year.						Number.
In 1893	..	..	..	..	..	2,671
1892	..	..	..	..	..	8,629
1891	..	..	..	..	..	24,325

from which figures it is evident that the inflow of immigrants will soon cease altogether, unless the state of the country and the condition and prospects of immigrants improve.

The number of German immigrants fell off in particular, partly on account of immigration from Germany as well as from Russia, Spain, and Italy being prohibited while the cholera was prevalent in those countries.

The following are the particulars of the immigration in 1893:—

NATIONALITY.

						Number.
German	..	..	..	..	..	162
Italian..	..	..	..	..	..	1,156
Austrian	..	..	..	..	..	782
Spanish	..	..	..	..	..	388
French..	..	..	..	..	..	18
Belgian	..	..	..	..	..	7
North American	..	..	..	..	..	5
Portuguese	..	..	..	..	..	91
Swiss ..	..	..	..	..	..	19
Polish ..	..	..	..	..	..	17
Russian	..	..	..	..	..	7
Greek ..	..	..	..	..	..	4
British..	..	..	..	..	..	15
Total	..	..	..	..	..	2,671

STATE.

						Number.
Single ..	..	..	..	..	..	1,504
Married	..	..	..	..	..	1,070
Widowers	..	..	..	..	..	97
Total	..	..	..	..	..	2,671

OCCUPATION.

						Number.
Agriculturists..	..	..	..	..	..	1,939
Operatives ..	..	..	..	..	..	482
Other ..	..	..	..	..	..	250
Total ..	..	..	..	..	..	2,671

SEXES.

						Number.
Males ..	..	..	..	..	..	1,554
Females ..	..	..	..	..	..	1,117
Total ..	..	..	..	..	..	2,671

AGE.

						Number.
Above 12 years old ..	..	..	..	..	..	1,782
Under ..	..	..	..	..	..	889
Total ..	..	..	..	..	..	2,671

PROVINCES.

						Number.
Rio Grande ...	..	..	..	..	..	217
Pelotas..	..	..	..	..	..	51
Bagé ..	..	..	..	..	..	20
Piritiny ..	..	..	..	..	..	4
Porto Alegre ..	..	..	..	..	..	2,379
Total ..	..	..	..	..	..	2,671

Since my report on this subject for 1892, the municipality have Domestic servants.
revived a law for the regulation of domestic service, by which every servant has to be registered by the municipal authorities, and to have a book in which are entered the dates and terms of engagement and character on discharge.

Ten days' notice before leaving or discharge is required except in cases of misconduct. It is to be hoped that this law will be efficiently administered, when domestic service in Rio Grande may be expected to improve and the difficulties and troubles pointed out by me previously may disappear.

However, law or no law, it is often the masters who are as much to blame as the servants for the independent ways of the
(1802)

latter, and in houses where they are treated with consideration and given good food and decent and comfortable quarters, and know that if they fall ill they will be taken care of and receive medical assistance, servants generally perform their duties cheerfully and remain for long periods. However, unhappily these are in a great minority.

The great difficulty with servants is their ignorance and want of morality. Marriage among the negro servants is almost unknown and not considered necessary to domestic happiness. Consequently, few female servants will live where they work, but return at night to attend to their own homes.

Missions.

The American Episcopal Mission has sent out its missionaries to this State to endeavour to elevate the moral tone of the people, and in the 4 years since the mission commenced its work, the progress has been most satisfactory. It is wonderful how welcome the preaching and teaching of these young energetic American missionaries has been to the poorer and uneducated classes, and their chapels at Porto Alegre, Pelotas, and Rio Grande are thronged at every service.

The Bishop of West Virginia recently visited the mission and ordained three young Brazilian deacons, and confirmed many hundreds of persons who had been fully prepared by the clergy.

It is owing to the zeal and kindness of these missionaries that Rio Grande do Sul has had, since 1892, a Church of England service every Sunday, which has been much appreciated, not only by the small British colony, but also by the English seafaring folk.

PORTO ALEGRE.

Trade and Commerce.

During the year this has still been in an abnormal and unsettled condition, owing to the Civil War which has been going on since November, 1892, to the great detriment of all industries and commerce, and without any decisive results. Business has in consequence been going gradually, but surely, from bad to worse, though for some time the effects were not so severely felt in Porto Alegre as in other parts of the State, owing to the fact that the trade of Porto Alegre is principally with the important and growing settlements or colonies of Germans and Italians in the surrounding districts, which for a long time kept free from the political entanglements that have been disturbing the other parts of the country; and as importation fell off and stocks became reduced, good prices were obtained. Therefore business was much more active and prosperous here than might have been expected; until the revolution broke out in Rio de Janeiro on September 6, when it became impossible for vessels under the national flag to run between this port and the north, and for a time all communication was cut off.

Trade was immediately disorganised, exporters could no longer

ship produce from here to Rio and other ports in the north of Brazil, these being the markets on which Porto Alegre and the colonies alluded to chiefly depend, and consequently producers could not find an outlet for their products.

For about 6 weeks there was no communication from Rio, the European mails were detained there for want of means of communication, and the telegraph service was stopped, both by land and sea, by order of the Federal Government. At last a small Norwegian steamer came here and took cargo up to Rio de Janeiro, her flag protecting her from seizure by the rebel fleet there. She took in a return cargo for this State and brought down the long accumulation of mails, which of course amounted to an unusually large number.

Owing to the difficulties of exportation all the industrial establishments were severely affected, and some of the lard refining works, a very important branch of trade with the north, were stopped altogether, but they subsequently reopened when communication was restored.

The revolt in Rio has accentuated the difficulties under which this State has been labouring.

By degrees the interior of the State has become more and more devastated, houses of business have been in many instances sacked by one or other of the contending parties, assassinations have taken place, and people in some parts are afraid to keep their houses of business open. In some cases stocks have been packed up and sent back to Porto Alegre at considerable expense and warehoused here, waiting until matters mend.

Cattle and horses are carried off by both sides wholesale, and often in the most wanton fashion. The wintering establishment of an English company, the Brazilian Extract of Meat and Hide Factory, has been raided four times, twice by Government forces and twice by insurgent forces, turn and turn about, damage to the extent of something like 100,000 milreis (about 4,000*l.* at present exchange, 10½*d.*) having been done. In some cases cattle had been simply speared and left to die, in others a small piece of meat had been cut off and the rest of the animal left to waste, while in other instances only the hide had been carried off.

The representatives of the company here are sending home the necessary proofs and documents in order that the Board of Directors in London may bring the matter directly before H.M. Government.

In another case an Englishman living in a small town near here had a milch cow of superior breed, which was valued at about 150 milreis, driven a short distance away and then killed, the hide only taken off (that being at the same time portable and saleable) and the carcase left to rot.

Another Englishman had his riding horse taken in the same district, and as it was soon after seen by his wife when it was being offered for sale, she bought it back.

Cases have occurred in which a sum of money has been offered and accepted in order that a horse or mule might not be taken

away, and another group of the same party coming along later on has taken the animal after all.

Besides these small robberies, cattle and horses are taken on a much larger scale by the recognised forces of either side, and much wanton damage is done, as in the case of the English company already alluded to, where 1 kilom. of fencing was thrown down.

Unfortunately the disturbances are beginning to spread to the colonies, one or two of them having already been the scene of fighting, which has of course frightened business away, houses having been shut up and the owners going away in order to save their lives.

Recruiting has been going on from time to time by impressment, and latterly the national guard has been called out. Clerks, artisans, and even tradesmen and merchants have been taken away from their occupations, and though at present they have not been sent out of their own district it has caused a great upset to business, and the after effects of this desultory soldiering will probably be anything but beneficial to the habits and morals of the younger element, all classes, whites and blacks, being indiscriminately mixed together.

The results of all this to business may be imagined, and as martial law prevails there is no confidence as to the course of events, consequently trade is coming gradually to a standstill, and importers find a difficulty now in getting rid of their stocks at paying prices. Some houses have suspended their orders altogether, while others are only importing on a very moderate scale such articles as they are actually short of.

Still it is wonderful how business has kept up as well as it has done, and if this deplorable quarrel could only be settled it would probably soon recover its buoyancy as the stocks in the hands of country dealers are reduced to a minimum. Importers and wholesale dealers in Porto Alegre are, however, holders of considerable stocks.

To take effect from January 1, 1894, an increase of 30 per cent. has been made in the duties on a considerable number of articles, among the principal of which are the following :—Trimmings and fringes of all descriptions; chemises; shirts; laces; ready-made clothing of all descriptions; hosiery; brocades; handkerchiefs; velvets; plush; carpets; mother-o'-pearl articles; ivory; tortoise-shell; coral; gold, silver, platinum, and precious stones; looking-glasses, pictures, picture frames, vases, and all glassware above the common quality; fermented drinks and liquors, alcoholic drinks and liquors; bottled wine; furniture, and all articles made of or in part composed of white metal, gold, and silver; perfumery; playing cards; jewellery of all descriptions; figures, busts, statues, and all articles of luxury, decoration and ornamentation, of clay, earthenware, glass, copper and its alloys; works of art in marble, alabaster, porphyry, jasper, and similar stones; Paris points (nails); carriages and harness; boot and footwear with textures of silk or mixed with silk; hams, pickles, and preserved food of all kinds except when frozen; sausages, soups, jellies; all articles of silk;

arms and ammunition; watches and clocks, and all the miscellaneous articles comprehended in Class 35 of the tariff; gloves, stays, neckties, hats, bonnets, and caps of all descriptions; textures of linen, cambrics, drills, muslins, and others not classified, whether bleached, unbleached, coloured, striped, or printed; cloths, cashmeres, cassinettes, of wool, with or without a mixture of silk; damasks, programs, royals, China silk, knitted and similar goods, whether classified or not, &c.

On safety matches the duty is trebled and on tobacco and coarse salt it is doubled.

Beer and other alcoholic beverages, which hitherto have paid by liquid measure, are for the future to pay by weight, which in the case of beer will mean an increase of 100 per cent. according to the present interpretation of the decree, but there is a doubt as to what the real meaning is as regards an allowance of tare for the bottles. If the duty is enforced as understood at present, it will very likely practically annihilate the importation of beer and the cheaper wines in bottle, though the latter will no doubt be imported in cask and bottled here, as is already done to a considerable extent.

The increase on manufactured goods being principally on articles of more or less luxury will probably not affect the importation much, and it is a strange fact that never was there such a demand here for fancy goods and high-priced articles as there has been during the last year or two since exchange has been so low. People seem to spend 2*l.* more readily now than they would have spent 1*l.* 2 or 3 years ago, in spite of the difference in exchange.

Money has been plentiful, there is no doubt, in comparison with former years, owing to several causes, among the chief of which may be mentioned the good prices farmers have been getting for their products, and the money sent down here by the central Government for the purpose of carrying on the military operations against the revolutionists.

The troops stationed in this State being perhaps more numerous than in any other part of the Republic, and the pay of the army having been enormously increased in late years is another source of plentiful money.

Exchange has ruled pretty regularly during the year, and just before the revolt in Rio broke out it was decidedly firm and had risen to something over 1*s.*, but it then immediately fell to 10½*d.* and with a few fluctuations remained steady at 10¼*d.* to 10½*d.*, which is really remarkable considering what the country is passing through.

Prices of merchandise, property values, wages, &c., which for a long time, especially as regards the latter two, were maintained at a much lower rate in currency than the low exchange warranted have now come up to and even exceeded the level.

While exchange may be said to have fallen, roughly speaking, to half its former rate (2*s.* 3*d.* was exceptional and could not have been kept up permanently), wages have increased to two and a

half or three times their former figure, more especially for unskilled labour, and the value of land and houses, in some parts of the city at least, has risen in proportion. Eligible land for building sites in some of the suburbs has been sold for three times as much as could have been obtained for it 3 years ago. Plots of about 2,300 square yards at a considerable distance from the centre of the town were sold freely in auction at the beginning of the year for residential purposes at 15,000 milreis to 20,000 milreis, or about 750*l.* to 1,000*l.* at the time the sale took place.

Building materials have also become very dear, but it has not had much effect in stopping building, though the boom has slackened somewhat during the last few months owing to the political occurrences.

Everything in fact is now brought to the level of the present exchange, so that it is very unlikely the latter will ever regain its old position or even go materially over 1*s.* Circumstances are quite different now from those of other occasions when exchange has fallen, though its lowest point during the Paraguayan war was nearly 50 per cent. above what it is now (10½*d.*), and the cost of that war to Brazil was probably not nearly so great as the cost, directly and indirectly, of the disturbed state of the country, both politically and financially, for some time past.

Even articles of local production and consumption that have no direct relation to exchange, such as dairy produce, fowls, eggs, firewood, &c., have now gone up in price to the equivalent in gold, or even more, of what they cost when exchange was at its highest point, and living has become very expensive.

On former occasions when exchange has fallen, the drop has been only temporary and it has not affected such articles as have just been enumerated, and a timely loan in the European markets has quickly removed the depression. Now, however, it is hardly likely that a loan of any importance can be effected for a long time to come, while the drain on the resources of the country and the waste and destruction caused by the Civil War must be incalculable, added to which there is a general feeling of distrust as to the means adopted by the Government to meet its enormous expenditure. All this must tend to prevent exchange from recovering, and it would not be a matter for surprise if the future par were fixed at, say, 1*s.*

The special tariff granted to certain American manufacturers, alluded to in my last report, is beginning to have some effect, American shirtings, sheetings, and plain cotton goods gradually supplanting, to some extent, similar articles of British manufacture owing to the difference in duty, but in finer articles, such as prints, dress goods, woven cloths, &c., British makers hold their own yet. The effects might probably have been more evident but for the falling off in the importation of manufactured goods generally.

Although they are not an article to which the difference in duty is extended, American pianofortes appear to be coming into favour here, one dealer having commenced to import them, and he

considers them superior to those which come from France and Germany. English pianos have been driven out of this market a long time ago, principally because they were not sufficiently showy and ornamental and were perhaps rather more expensive, though for lasting power and general excellence those of reputed makers are, in my opinion, much superior to the German pianos, price for price.

Since commencing to write this report it has come to my knowledge that a syndicate exists in Rio de Janeiro for the purpose of obtaining from the Government the repayment of duties, which, it is alleged, have been paid in violation of the treaty between this country and the United States. A traveller has been here representing the syndicate which, he states, has obtained from the Government a verba or credit of 3,000,000 milreis for the purpose of making the restitution, and, according to his assertion, the Brazilian Government, by the treaty in question, bound itself not to raise the duties on American goods as per schedule until the expiration of the treaty. As nothing was said about payment in gold it is claimed that the premium on gold, and the augmentation of the duty now collected instead of the premium on gold, should not have been levied on American goods, that the doing so has been a contravention of the treaty, and that the amount so paid should be restituted. The sum subject to restitution is very large and is estimated at 10,000,000 milreis to 15,000,000 milreis altogether, but the syndicate in question only proposes to take cases up to the amount for which, according to the statement of its representative, it has obtained the above-mentioned credit, about 120,000*l.* at 10*d.* exchange.

They propose to present the claims without any preliminary charge, their remuneration being 30 per cent. of the amount recovered, and anyone entrusting a claim to them has to sign an undertaking to that effect. Should this scheme prove successful and it be decided that the articles mentioned in the treaty are not to pay either a gold premium or a percentage in place of it on the tariff rates in currency, besides receiving an abatement of 25 per cent. on the latter, it will be a further and most serious blow to British manufactures, for it will mean an advantage of about 115 per cent. in favour of the American manufacturer. That is, taking the tariff at 100 per cent., American cottons and other articles will pay 75 per cent., while British and other manufactures of the same class will pay 100 plus 60 per cent., and in some cases a further 30 per cent. equal 190 per cent. It seems too absurd to suppose that such a pretension can be admitted, as the reasonable interpretation of the intention of the treaty is that certain American articles were to have an advantage of 25 per cent. in duty over those of other nations, and a very great advantage it is.

It seems, therefore, preposterous to suppose that the Brazilian Government, requiring to raise duties all round for revenue purposes, could not do so on American goods provided the difference of 25 per cent. were maintained, but as the Americans are in high favour with the Government just now there is no saying what may be done.

Should, however, this extraordinary claim be satisfied, and consequently the enormous difference just pointed out be established, it would mean that the British manufacturer would have to sell his goods at about 50 per cent. below the American in order to enable them to be placed in this market at the same cost, duty paid, as the American goods, or in other words to sell 100% worth of goods for 50%.

As might be expected from the large number of Italian colonists settled in this district, Italian manufactured goods are beginning to find their way here, and about 6 months ago a traveller representing a manufactory in Genoa was here with an assortment of samples of very nice goods consisting of cotton trouserings, gingham, and woven check and stripe goods, and considering the state of affairs he pronounced himself well satisfied with the result of his visit.

German trade with this port appears to be decidedly increasing, while it is to be feared that British trade is decreasing. This, to some extent, is being assisted by the better facilities offered recently by the German steamship companies from Hamburg, and the lower freights by sailing vessels which will be alluded to further on.

The trade in wrought-iron, and to a great extent in steel also, has been quite diverted from England to Germany in consequence of this, while the machinery for a large cotton and wool factory established here recently was all got from Germany, though this I think is mainly due to the fact that the foreman, under whose advice the machinery was selected, was a German. It is stated to have cost more than English machinery, while it would require an expert to say whether it is equal to or better than the latter.

No statistics of the amount of trade done here can be got, and even if they could, in the present circumstances they would not be a criterion of the ordinary trade of the place.

Shipping and Navigation.

As mentioned before this has been much interrupted during a considerable portion of the year.

The first occasion was in July, when Admiral Wandenkolk attempted to seize Rio Grande, and for about 3 weeks no vessels were allowed to leave this port.

The second and more serious disturbance to maritime traffic occurred on September 6, when the revolution of the navy broke out in Rio de Janeiro, and the interruption still continues as far as regards national vessels going outside the bar of this State.

Unfortunately, the consequences have been more disastrous to the trade between England and this State, than to that from Germany and other countries shipping through Hamburg, owing to the steamers which run between this port and Rio de Janeiro in connection with Messrs. Lamport and Holt's Trans-Atlantic steamers, and which were formerly owned by that firm and run

under the British flag, having been transferred about 3 years ago to a Brazilian company, and, therefore, to the Brazilian flag, a proceeding induced probably by the expected prohibition of coasting traffic to foreign vessels, but which was, to say the least, somewhat premature, as foreign vessels are still engaged in that traffic and probably will be for some time to come. Were it not for them, in fact, we should be cut off from communication with Rio de Janeiro altogether.

The result of this transfer is that the former British steamers have been unable to make any voyages since the revolution broke out. Some of them which were loading or loaded here at that time, after being detained here a while by the authorities, were allowed to go down to Rio Grande, and there they are staying yet, the cargo having in some cases been transferred to foreign steamers by order of the shippers. One of the vessels is detained in Rio de Janeiro with British cargo on board transhipped from Messrs. Lamport and Holt's Liverpool steamers, and belonging to British and other owners here, to whom the detention is causing very great inconvenience and loss. This vessel was ready to sail just when the revolt broke out. Goods shipped from England subsequently, and transhipped in Rio to British steamers have been much delayed.

As a contrast to this, two Hamburg companies commenced to run steamers at the beginning of the year between that port and Rio Grande, calling at Rio de Janeiro and other ports on the way, but without any transshipment; and as the vessels are too large to conveniently come up to Porto Alegre (owing to the one or two shallows at each entrance to the lake, but which could be removed at a very moderate expense if properly undertaken, so that any vessel which could cross the bar at Rio Grande could come up here) they sent out four large lighters to carry cargo to and from Porto Alegre and their steamers in Rio Grande.

The two companies work together, and run steamers alternately twice a month. These arrangements were just completed when the revolution broke out, and all shipments from Hamburg to this State, formerly transhipped in Rio de Janeiro to the same steamers that brought down the cargo transhipped from the English steamers, have been, of course, made by the direct line, and have arrived here with the usual regularity, the occurrences in Rio de Janeiro having caused no interruption to the service, these steamers having ceased calling there.

The German steamers have been earning magnificent freights between here and the northern ports of Brazil as well as to Europe, and it is unaccountable how the field was left clear to them so long.

The first foreign steamer to appear here after the revolution broke out was a small Norwegian vessel, the "Norte," which made one or two very successful voyages on its own account, the master being also owner, and it was afterwards snapped up by a firm of merchants here on charter at a handsome figure. By degrees Argentine, Italian, and other foreign vessels appeared, British

vessels being amongst the very latest to come; and, judging by what has occurred here, it would almost look as though British energy, enterprise, and foresight were things of the past. Four vessels belonging to the Argentine Steam Lighter Company (British) did, however, at last begin to trade from here with some degree of regularity, one of them being taken up on charter for a term, but the lion's share of the trade had already been diverted to the German steamers, and it is not too much to say that it will be a very difficult, if not impossible, task to get it back again. In fact, the Germans have now succeeded in getting the bulk, which was formerly British, of the carrying trade of this State into their hands, which was about the only trade of importance they had not got.

Even a small Italian steamer came out here direct from Genoa, and I understand it will continue in the trade.

It seems strange that with so many British steamers looking out for employment no suitable vessels have been sent here. One outsider which brought a cargo from Antwerp, Hamburg, and London to Rio de Janeiro and Rio Grande, calling at one or two other ports on the coast, and bringing cargo for Porto Alegre also, was unsuitable, on account of great draught, for Rio Grande, but even so she got a very handsome freight outward from there to Rio, and if she had been of more suitable carrying capacity in proportion to her draught she could have done a great deal better.

If it pays the German companies to put on two steamers per month, it does not seem extravagant to suppose that one could be kept going from England, and although present circumstances are exceptional, the German steamers were put on before they happened, and because it was expected that the business would pay in normal times. Even should the restrictions on foreign vessels as regards coast traffic come into operation, the German steamers will probably be able to avoid them in a great measure by going from Rio Grande via Monte Video, and so making it a foreign voyage.

The lighters in connection with these steamers will also remain under the German flag probably, as they will really be only a prolongation of the steamers.

Before dismissing this subject it should be mentioned that freights per sailing vessel from Hamburg are generally much lower than from Liverpool, ruling from 1*l.* 7*s.* 6*d.* to 1*l.* 15*s.* per ton in full, as against 1*l.* 15*s.* to 2*l.* 5*s.* per ton, with 10 per cent. primage. Besides this the vessels from Hamburg discharge their cargoes here free of expense to the consignees, while in the case of vessels from Liverpool the consignees have to pay the cost of lighterage, &c., which usually amounts to an average of 6 per cent. to 7 per cent. on the freight and primage. It is this difference in freight which has had much to do with, if it has not been the sole cause of, diverting the iron trade to Germany.

Navigation has been occasionally much impeded by the unusually low state of the water, due to the very dry weather during the latter part of the year, which is the springtime here. For two or three months a north-east wind prevailed, which always

has the effect of lowering the water, and it has seldom been seen so low.

Even lighters and other small craft were unable to come alongside many of the usual landing places, and this caused some difficulty and delay in discharging vessels.

Since the beginning of the new year there have been some very heavy downfalls of rain which have filled the rivers and brought the water to perhaps more than the usual depth for the time of the year.

A tax of 300 reis per ton for sailing vessels, and 400 reis for steamers has been levied by the Municipal Government of the city of Porto Alegre, on all vessels over 13 tons capacity, lighters and other craft included. It is very doubtful whether this tax is legal in the case of foreign sea-going vessels; whether such a tax is within the attributes of the municipal council. It is an annual tax, payable for a year or fraction of a year, and although it may not be very onerous to vessels trading regularly to and from this port coastwise, perhaps a dozen or two dozen times a year, it is very unjust in the case of a vessel coming with a cargo from a foreign port and then probably going away in ballast, most likely never to return again, or at any rate not in the same year.

There is no service rendered to ships by the municipality in relation to which the tax is supposed to be levied, and it seems to be nothing more than one way of raising money for purely municipal purposes.

No accommodation is afforded to ships by the Corporation, and even if they could go alongside any of the wharves belonging to the city, they would not be permitted by the custom-house authorities to discharge there, and they would have to pay a further charge for doing so to the lessees who rent them from the municipality and make a private business of them.

As with other things, the price of cattle in currency has risen considerably. The Civil War will probably have the effect of paralysing or at least greatly disorganising the chief industry of this State, viz., the manufacture of xarque or dried beef, and the robberies and slaughter of animals by the different forces on the war path, and by marauders who take advantage of the present condition of affairs to carry on their depredations, must have contributed to reduce the herds to a considerable extent.

This continues to increase somewhat rapidly, and has lately been more than usually augmented by people from the country who have flocked to the cities in consequence of the insecurity outside.

Building has been very active, and a great improvement is taking place in the appearance and comfort of the buildings. Some really nice looking villa residences have been built or are still building in one of the pleasantest suburbs of the city, alluded to in an earlier part of this report. Houses are occupied as soon as they are built, and are eagerly sought after.

The city is governed by a municipal council and an intendente, on similar lines to the State Government. That is to say, the
City government.
 (1802) C

council is a kind of congress which merely votes supplies, the real government of the city being in the hands of the intendente, who makes all the laws and regulations when and how he thinks proper.

Fortunately the present intendente is a very active and energetic man, who has done a good deal towards improving the paving of the streets and roadways. The drainage is surface draining, and, owing to the topographical formation of the city, is perhaps the best suited to its requirements, unless underground sewerage were very well carried out.

The extraordinary heavy rains which sometimes fall here and the steep streets combined would make it necessary to have immense main sewers to prevent bursting. Even as it is, the water often cannot get away quickly enough, and the streets, during a sharp shower, become in some instances rapid streams and cataracts. This has the effect of thoroughly cleansing the city, and as there is no sewerage system, there are of course no water-closets in the houses.

The system in use is that of small tubs which are shut hermetically and taken away by the contractor at such periods as may be convenient to the householder, and they are at present emptied at a point where the city juts out into the River Guahyba, or more properly speaking the head of the lake.

The Corporation, however, proposes to remove this service to a point further away down the lake, for which purpose it intends to construct a short railway, which will also be used for bringing in ballast for levelling streets and for making a quay or embankment right round the front of the city.

This scheme is very ambitious, and will probably not be carried out at a very early date, as it will seriously affect existing foreshore rights, and also the warehouses and existing wharves at the riverside, so that unless the municipality abuses its power by using unfair compulsion, not an altogether unlikely thing, the compensation would be immense.

The sweepings of the streets and the contents of dustbins are taken to the outskirts of the city and burnt in a large incinerating furnace constructed for that purpose by the municipality a year or two ago.

A great deal has been done recently to improve and clean the city, but though the system itself is good there is not sufficient compulsion brought to bear to induce the lower orders to take advantage of the conveniences offered, and the work, as is unfortunately too often the case here, is generally speaking badly carried out, so that the best scavenger the city possesses are still the heavy rains which fall occasionally and literally sweep everything before them, in the shape of rubbish and garbage, into the river, the lower class of householders availing themselves of the opportunity to throw their refuse into the streets.

The estimated receipts of the Corporation for 1894 are 1,475,995\$460 reis (about 62,000*l.* at 10*d.* exchange), of which 390,000 milreis (about 16,250*l.*) are raised by loan for improve-

ment purposes, and 280,000 milreis (about 11,600*l.*) form the balance carried over from the previous year.

The taxes, generally speaking, are very heavy, and have been considerably increased year by year latterly. The tax on house property is 10 per cent. on the assessed value.

A national bank or branch bank having its head office in this State pays, for 1894, a yearly tax of 2,000 milreis (about 83*l.*). If the head offices are outside this State the tax is 3,000 milreis (about 125*l.*), and if it is a foreign bank the tax is 4,000 milreis (about 166*l.*). In 1893 the tax was 2,000 milreis, irrespective of nationality or headquarters, and previously the tax was 1,000 milreis.

Insurance companies or their agencies pay as follows:—

If the company has its head office in this city, 500 milreis (20*l.*).

If an agency or branch of a company whose head office is in this State, 1,000 milreis.

If a company whose head office is not in this State, 1,500 milreis.

Last year the tax was 800 milreis without distinction, and previously it was 600 milreis.

Shopkeepers pay 10 per cent. on the assessed rental; generally the full value. Dealers who import and sell, both wholesale and retail, pay 12 per cent., while importers who sell wholesale only pay 15 per cent. The tax on house property is estimated to bring in about 380,000 milreis in 1894 (about 15,800*l.*), and the markets, wharves, and other property belonging to the municipality produce important amounts.

National, State, and municipal properties are exempt from taxation.

Sunday closing is obligatory, with the following exceptions:—Chemists, hotels, eating-houses, restaurants, cafés, bakeries, undertakers, butchers, and kiosks, and business houses generally outside certain suburban limits. Any infraction is punished by the respective taxes being raised to 10 times the ordinary amount, and the proof of one single transaction made on a Sunday is sufficient to render the offender liable to the penalty.

This law has nothing whatever to do with religion, but is purely for the purpose of allowing shop employés and others a day of rest.

The expenditure, which is made to equal the receipts by the item of "sundries" to the extent of 4,100 milreis (170*l.*), includes the following:—

Description.	Amount.	
	Currency.	Sterling.
	Reis.	£
Administration	140,000	5,800
Superannuations	6,000	250
Amortisation and interest on loans ..	113,180	4,720
Municipal police, including rent, fiscal agents, arms, uniforms, &c.	172,600	7,200
Public illumination	183,000	7,600
Scavenging.	85,000	3,540
Subscriptions to hospitals, &c. .. .	12,500	520
Maintenance of streets, roads, &c. ..	36,000	1,500
Improvements	698,455	29,100

The latter amount includes a premium of 10,000 milreis (416*l.*) for improving the breed of horses, but how it is applied I do not know. It also includes the sum of 460,000 milreis (19,166*l.*) for the construction of the short railway already mentioned. The remainder of this amount is chiefly to be spent in making new pavements, renewing old ones, making side-walks, and generally improving the streets, squares, &c.

Industries. There is nothing new to remark with regard to these. Naturally no new undertakings have been commenced lately.

Public works. No fresh works have been started during the past year.

The railway mentioned in my report for 1892 as branching off from Santa Maria northwards to ultimately connect with the State of São Paulo has so far progressed as regards the section in this State that it has been of some use to the Government in moving troops, and the permanent way is completed as far as Villa Rica, a distance of 78 kiloms.

Public health. The public health continues fairly good, and there has been no epidemic during the year, though typhoid fever and small-pox have been rather prevalent.

Immigration. Immigration has been practically suspended during the latter half of the year, in part owing, no doubt, to the occurrences here, but also because the Federal Government has prohibited immigration from Spain, Italy, Germany, and Russia, owing to the cholera there. The numbers, therefore, fell considerably below those of former years, the aggregate entries during 1893 having been 2,795, composed as follows:—

RIO GRANDE DO SUL.

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Nationality.	Total.	Males.	Females.	Married.	Single.	Widowers or Widows.	Children up to 3 Years.	Children up to 12 Years.	Over 12 Years.	Agri- culturists.	Operatives.
	Number.	Number.	Number.	Number.	Number.	Number.	Number.	Number.	Number.	Number.	Number.
Italians ..	1,503	846	657	532	921	50	154	411	938	1,352	90
Austrians ..	552	302	250	228	317	7	59	151	342	187	313
Spaniards ..	434	243	191	192	229	13	49	85	300	124	189
Germans ..	219	136	83	74	143	2	22	43	154	146	138
Portuguese ..	50	34	16	12	36	2	3	10	37	0	35
French ..	17	10	7	6	11	0	1	4	12	8	3
Russians ..	10	7	3	4	6	0	0	4	6	10	0
Poles ..	6	2	4	2	3	1	0	0	6	5	0
Swedes ..	3	1	2	2	1	0	1	0	2	3	0
British ..	1	1	..	..	1	..	..	..	1	..	1
Total ..	2,795	1,582	1,213	1,052	1,698	75	284	708	1,798	1,835	669

When the agriculturists and operatives together do not make up the total, the remainder are classified under the head of sundries, and as both the women and children are included they are evidently classified as belonging to the trade of their husbands and fathers respectively.

Although the number is so much smaller than in 1891 when the total reached 24,325, the class of immigrant appears to have improved, for it will be noticed most of them are put down as agriculturists.

Only 291 are classified under the head of sundries, and most of these probably had some occupation, so that the vagabond element, such as came in large numbers in 1891, is almost, if not entirely absent.

The Italians still hold the first place, but in 1891 they numbered 12,183.

The Austrians who are chiefly, if not entirely, from the Austrian Tyrol take the second place as against the sixth place in 1891, and almost with the same number, 552 against 667, showing a much smaller falling-off than any other nationality. The Spaniards still hold the third place with 434 against 2,903 in 1891. The Poles who were second in that year with 4,397 have almost ceased to come here, the experience with former immigrants of this nationality having been very unsatisfactory, nearly 3,000 of them being sent back in 1891. The Germans are still in the fourth place, but in 1891 they numbered 1,990. All the Germans were non-catholics, as were also the Russians, the Swedes, and the one Britisher. These immigrants, together with 640 Italians and 24 Spaniards, brought over from last year's returns, were distributed among the various colonies of settlements, with the exception of 728, composed of almost all the nationalities, but chiefly Spaniards (376) and Italians (203), who remained in Porto Alegre, 67 who went to Rio Grande, and 10 who went to Pelotas.

Fires.

Fires have been very frequent here lately and in several cases the loss has been considerable.

The city has no properly organised fire brigade, and when a fire occurs it generally burns itself out.

There is only a small hand engine in not very good working order, and a hose reel, but both are of little use. The hose is in such a damaged condition that a large portion of the water sent through it is wasted. This material is supposed to be in the charge of one of the local companies, which receives a small and inadequate subvention from the municipality, much less than the amount of the taxes collected from insurance companies, although they are ostensibly levied for that purpose; but owing partly to want of funds and partly to neglect, it is in the comparatively useless state just described. Owing to the absence of a properly disciplined brigade the utmost confusion prevails as a rule on the occasion of a fire, and a great deal of robbery takes place under the guise of assistance. In consequence of the numerous fires which have happened lately (which appear to have been quite accidental, although there has probably been much carelessness in some cases,

it being a common habit to throw matches on the floor without seeing that they are extinguished, though fortunately the wood used here is generally not very inflammable, much less so than that used in Europe, and the match goes out without doing any harm, if not in contact with something else, otherwise accidents would be much more frequent than they are, owing to this negligent custom); and with a view to remedy the unsatisfactory position of things in this respect, the various national companies and the agents of foreign companies have appointed a committee to go into the matter thoroughly with the object of forming a small but efficient and well disciplined brigade, with the necessary material.

It is proposed to place the brigade under the direction of the committee, and the intendente municipal has promised to assist by a larger subvention and by reducing or abolishing the tax on fire insurance companies.

The expense of maintaining the brigade will be borne by means of a percentage charged by the companies on all premiums of insurance, and the municipality will give the force of law to the rules and regulations of the committee, which must be approved of by the intendente.

General Remarks.

British subjects should be very careful when making contracts to come out here for employment in factories, &c., to see that their agreements are properly and clearly drawn out, and that they are attested by a Brazilian Consul. They should also take care to have a duly signed and attested copy in their own possession. It is also advisable that they should not sign any agreement without assuring themselves that the other parties to it are duly authorised to act by power of attorney, or are themselves personally responsible.

The person engaging himself should not fail to have the copy of the agreement which he holds presented at the Brazilian Foreign Office in Rio de Janeiro to be "legalised," in order to give it effect in this country.

Without these precautions it is quite probable that whenever the contract is felt to be irksome or inconvenient by the parties on this side, they will take advantage of any flaw to break through it.

A little more than a year ago a manager and three workmen were engaged by a house in Manchester, on behalf of Senors Taborda and Schilling, the proprietors of a newly established print works in this city, who subsequently turned the concern into a limited company called the Fabrica de Chitas Porto-Alegreuse.

The agreements were signed for a 3 years' engagement, and all went well for some time, but at last the injury to business, caused by the Civil War, affected the transactions of the company in question, and sales having fallen off it became inconvenient and burdensome to continue paying the salaries of the employes en-

gaged in England, more especially as, being payable on a gold basis, they became rather high in currency owing to the low exchange. This being the case, without more ado and without previous warning the company dismissed them on December 31, alleging as a reason "force majeure" caused by the Civil War! Being applied to for advice I referred the applicants to a good lawyer here who has taken their case up, and it remains to be seen what can be done to obtain justice.

The men are willing to make a very reasonable and liberal compromise, which, knowing one of the principal directors, I personally tried to induce the company to accept, but they will not listen to it, so the matter will have to be brought before the tribunals, a wearisome and expensive process.

It appears only one contract was signed with each person, and the four were sent out to the company here.

The men were promised copies but they were never sent, and they would probably have been valueless for any legal purpose.

The manager was able to obtain possession of his contract by chance and has kept it and had it legalised in Rio de Janeiro. But the company refuses to give up those of the men or to allow copies to be taken. I am informed by the lawyer that the company cannot be compelled to produce the contracts in court, which seems contrary to what is right and just; and even if the company were to give them up or allow copies to be taken they would have to be sent up to Rio de Janeiro to be viséd in order to have legal force.

All this means delay and expense, and, therefore, I strongly advise all persons making contracts to come out to situations in Brazil to see that their papers are in perfect order.

RETURN of British Shipping at the Port of Rio Grande do Sul in the Year 1893.
Direct Trade in British Vessels from and to Great Britain and British Colonies.

Entered.				Cleared.			
Total Number of Vessels.		Total Tonnage.		Total Number of Vessels.		Total Tonnage.	
With Cargoes.	In Ballast.	With Cargoes.	In Ballast.	With Cargoes.	In Ballast.	With Cargoes.	In Ballast.
Total.	Total.	Total.	Total.	Total.	Total.	Total.	Total.
1893— 6	...	16	9,809	...	9,809	155	...
1892— 23	...	23	6,998	...	6,998	175	...
						£	£
				11	21	32	2,284
				18	8	26	3,877
							8,774
							8,154
							223
							194

(1802)

Indirect or Carrying Trade in British Vessels from and to other Countries.

Entered.				Cleared.			
Number of Vessels.		Tonnage.		Number of Vessels.		Tonnage.	
With Cargoes.	In Ballast.	With Cargoes.	In Ballast.	With Cargoes.	In Ballast.	With Cargoes.	In Ballast.
Total.	Total.	Total.	Total.	Total.	Total.	Total.	Total.
Countries whence Arrived.	Countries to which Departed.			Countries to which Departed.			Value of Cargoes.
Brazil	25	5	7,856	2,363	10,219	271	£
Belgium	6	...	12,144	...	139	...	...
Spain	7	...	1,172	...	39	...	...
United States	8	...	2,683	...	67	...	...
Argentina and Uruguay	22	...	8,647	...	252	...	...
Others	2	...	482	...	12	...	...
Total in 1893	70	5	32,984	2,363	35,347	781	...
" 1892	76	1	50,857	334	51,191	959	...

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ON THE
TRADE OF CHILE.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1311.

*Presented to both Houses of Parliament by Command of Her Majesty,
APRIL, 1894.*

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1277. Tokio	2½d.	1337. Riga	2d.
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CHILE.

SANTIAGO.

Mr. J. G. Kennedy to the Earl of Rosebery.

My Lord,

Santiago, February 16, 1894.

I HAVE the honour to transmit herewith to your Lordship a Report on the Commerce of Chile during the year 1893.

The report of Her Majesty's Consul-General at Valparaiso, dated September 10 last, and published in the Annual Series of Diplomatic and Consular Reports on Trade and Finance No. 1311, covers the trade of Chile for the year 1892, and includes the various Consular Reports addressed to the Consulate-General during the past year.

Although no official statistics for the past year can be expected for some months, I have been able to furnish what I believe to be trustworthy information respecting Chilean international trade operations during 1893, mainly owing to the valuable assistance of the Rev. H. Wetherall in obtaining information from leading commercial firms in Valparaiso.

The present stagnation in trade, which is to a great extent attributable to the want of confidence in the Government Conversion Scheme, is likely to continue.

For if the impending General Election should result in giving a strong Government, and should the New Congress decide on giving a strong support to the Law of Conversion, and thereby induce a belief in the success of that operation, many sacrifices would necessarily be imposed on the banks and also on private individuals, for advances would be restricted and private expenditure would have to be curtailed, in order to conform to the new situation created by a return to specie payments and to a fixed exchange value of 24*d.* to the dollar.

Another point which adds to the general anxiety is the knowledge that the banks have recently increased their issue of mortgage bonds, whilst the amount of their advances and loans has been but slightly reduced.

This is regarded as an indication that many persons have
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mortgaged their property in order to repay loans, and shows an increase of the class of persons whose interests are opposed to the carrying out of the Conversion Scheme.

The latest returns published by the Official Gazette suggest that perhaps too moderate a stress has been laid in my Report upon the importance of the bank issues of mortgage bonds.

The outstanding advances and bonds expressed in millions of paper dollars are as follows:—

	Millions of Paper Dollars.				
	June, 1890.	June, 1892.	December, 1892.	June, 1893.	December, 1893.
Advances and loans..	117	145	155	145	148
Mortgage bonds ..	89	103	110	121	130

I have, &c.
(Signed) J. G. KENNEDY.

Report on the Trade and Commerce of Chile during the Year 1893.

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Complete
statistics
unattainable.

The collection of statistics with regard to the trade and finance of Chile is a somewhat unsatisfactory task. The mischievous effect of the social and political derangement, caused by the civil war, has not yet been entirely obliterated. The Government offices are being worked up with zeal and diligence into a condition of efficiency, and no doubt in the coming year valuable and complete details of the ebb and flow of commerce will be furnished from this quarter. For the period immediately succeeding the civil troubles, however, it was not found practicable to set forth these details with the full minuteness required to satisfy the requirements of statisticians.

Controversy
about tariff
returns.

Further, it is a matter of dispute among Chilean experts as to how far the custom-house returns, based as they are upon an old tariff, can be relied upon for absolutely accurate indications, at any rate of the value of articles of import. On

this point a controversy has lately afforded a topic for frequent conversation amongst business men and politicians. On the whole, the result of the controversy has not been unfavourable to the reputation of the custom-house for accuracy of calculation. Still sufficient discrepancy has been suggested between the intrinsic value of some imported articles, and the value with which they are credited for tariff purposes, to introduce some element of uncertainty into the task of collecting statistics.

With the assistance, however, of the records of commercial houses some of the chief features of the trade of Chile during the past year of 1893 can be presented. Approximate estimate of exports for 1893.

One of the leading firms estimates the value of the year's exports approximately as follows, though it must be noticed that the values attached to silver and gold, though probably fairly correct, are somewhat conjectural. And further, under the head of the Chilean export of silver the immense output of the Huanchaca Mine is included. This mine is situated in Bolivia, but its shares are mainly held by Chileans, and its produce is shipped through the Chilean port of Antofagasta.

Description.						Amount.
						£
Nitrate	..	..	..	..	..	6,200,000
Copper	..	..	..	..	..	900,000
Silver ..	..	..	..	..	..	1,500,000
Gold ..	..	..	..	..	..	20,000
Manganese	..	..	..	..	..	80,000
Wheat..	..	..	..	..	..	800,000
Barley..	..	..	..	..	..	90,000
Wool ..	..	..	..	..	..	80,000
Sundry minor exports	..	..	..	..	..	100,000
Total	..	..	..	..	..	9,770,000

How far this sum of nearly 10,000,000*l.* represents the true purchasing power of Chile in foreign markets it is not easy to determine. Genuine spending power of Chile.

Chile has large sums to send out of the country in hard cash.

For the service of the foreign debt 615,750*l.* is required. Drain on

Large sums are invested by foreigners in internal securities, such as the mortgage bonds issued under the management of the banks. At the present rate of exchange the total value of bank mortgage bonds is about 6,000,000*l.*, bearing interest to the amount of more than 400,000*l.*, of which a considerable but unknown portion has to be remitted to foreign holders. Many wealthy Chileans reside in the different centres of European life in addition to the diplomatic and other officials of the Chilean Government. Chilian resources for foreign remittances in gold.

It has been roughly estimated that there may be a 100 such families spending some 4,000*l.* a year each on an average.

Though this may only be a somewhat unreliable conjecture there is no doubt that, under this head, a considerable sum must be deducted from the national income from exports before arriving at a calculation of the net amount which the country has available for expenditure on foreign imports.

The extraction of nitrate also, it should be noted, is carried on by companies with foreign shareholders. Much of the prices of each ton of nitrate no doubt remains in the country in the form of duties and working expenses. Some portion of it, however, reaches the foreign shareholder in the form of dividends, and helps to swell the sum total to be deducted from the value of Chilean exports before arriving at a just estimate of Chile's power to absorb imports.

Inflated
business of
1892.

The commercial phenomena of the past year point to an over-expenditure during the previous year of 1892 upon imported articles. During 1892 the commercial temper was marked by an unreasonable buoyancy.

The civil troubles connected with the late President Balmaceda having passed the acute stage, it was widely imagined that an era of unqualified prosperity would at once set in. During the late President's régime the inconvertible currency of Chile had been considerably augmented. The banks over-full of money, competed with one another in making advances upon easy terms. The year was a year of universal inflation. Goods were imported to an amount of almost one-fifth above the average, notwithstanding the fact that the exports fell short of the usual average. Moreover an additional reason for hurrying on importation lay in the notice given by the Government that the duties would be raised to a much higher rate.

Curtailment
of expenditure
in 1893.

This activity of the importing houses continued into the early part of 1893, when it came suddenly to an end.

On this point certain statistics covering 11 months of 1893 are significant. The articles specified comprise the most important articles demanded by the social and industrial life of Chile, being those for the most part especially needed to supply the shops and stores at which the great mass of wage earners deal, and to keep the railways, coal and nitrate works, and the mines in efficient working order.

Articles.	Value.		Approximate statistics.
	1892.	1893.	
	£	£	
Cotton goods	1,087,819	468,741	
Woollen tissues	279,519	167,750	
Worsted	131,623	74,140	
Damask, tapestry, &c. .. .	63,329	55,241	
Hoops, sheets, boiler, and armour plates	27,848	18,191	
Galvanised sheets	127,891	101,311	
Bar, bolt, and rod-iron	72,828	41,025	
Railroad	37,663	50,450	
Hardware and cutlery	51,823	44,245	
Cast and wrought-iron	145,073	122,881	
Total	2,025,421	1,143,975	

These statistics, it will be seen, show a decrease in the importation of these necessary articles of nearly fifty per cent. The over-stocking of the market with imports during 1892 by one-fifth more than the average amount accounts for much of the falling-off. The spending power of Chile is liable to sudden derangement owing to the want of that reserve of wealth, which in other countries is represented by the existence of gold and silver coin. When once the amount of the value of the exports has been exceeded there remains nothing further upon which to draw. To some extent the stores of silver plate formerly existing in Chile compensated for the lack of a currency possessing intrinsic value. A considerable quantity of this from time to time found its way to the banks and was exported. Little if any of this, however, now remains. That the falling-off in such articles of luxury as damask and tapestry has been comparatively trifling is a suggestive circumstance.

Effect of the want of reserve of metallic wealth.

The drop in exchange, which, as will be pointed out subsequently, has been so marked a feature in the commercial history of the past year, affects a large proportion of the wealthier classes comparatively slightly.

Fall in exchange.

Such, however, has not been the case with the labouring classes, with those who work for fixed salaries, and with the professional classes. During 1893 the gold value of their incomes has been reduced by more than one-fifth of the amount at which it stood at the beginning of the year.

Serious reduction in the incomes of the working and professional classes.

Then the inconvertible paper dollar (the monetary standard of Chile) was worth about eighteen pence. It is now, in February, 1894, worth little more than one shilling—the fall has been gradual, but the diminution of income to the great mass of the Chilean population cannot be calculated at less than one-fifth during the past year. It may be regarded as significant that this, added to the one-fifth represented by the over-

The mystery of exchange. stocking of the market during the previous year, corresponds closely to the amount of the falling-off in the most necessary imports during 1893. To attempt to account fully for the unexampled fall in the gold value of the inconvertible paper dollar would be exceedingly presumptuous.

Why when at the departure of each mail to England the exchange brokers' books are made up, it is found that there has been so marked an anxiety to convert Chilean paper into foreign gold by the purchase of bills upon Europe is a problem very difficult to solve.

Factors of the exchange problem. Some of the factors of this problem, however, have been during the past year apparent enough.

The mere speculator. In the first place there was the result of the expectation, widely prevailing at the end of 1892, that the gold value of the paper dollar was on the rise. Relying on this hypothesis speculators had sold large quantities of bills for forward delivery, which had to be purchased when the transactions reached maturity. This cause alone thronged the exchange market, during at any rate the early part of 1893, with buyers of gold far in excess of those who had gold to sell.

Importers waiting for a rise to remit. Further, many importers, from the same expectations of a rise in the value of Chilean paper, had postponed the remittance of money for goods received from Europe. Thus eventually the number of those who were obliged to buy bills at any cost was gradually increased. The unreasonable expectation too, which widely prevailed, of the immediate restoration of social and political order upon the overthrow of President Balmaceda was not entirely fulfilled.

Nervous holders of Chilean investments. This caused a reaction of feeling abroad adverse to confidence in the stability of Chile. Many persons in Europe, who had money invested in Chile, seeing telegrams, which spoke of dictatorial plots, in the declaration of states of siege (an expression most misleading to the British mind), and at the same time announced a fall in the value of the paper dollar, did their share also in accelerating the depression in exchange. Urgent telegrams from time to time came to their agents in Chile to "sell out and remit at any price."

Action of parties interested in exchange fluctuations. Finally the nervousness of the exchange market in Valparaiso was encouraged by those professionally interested in maintaining violent fluctuations in the value of the dollar, and the constant opportunities thus given for large transactions in bills with their accompanying profits to those through whose hands the bills passed. When compared with gold a paper currency like that of Chile has to be regarded as a commodity subject to the laws of supply and demand.

Inconvertible paper currency to be regarded as a commodity. During 1893 there have always been, owing in a great measure to the causes above enumerated, far more persons anxious to sell Chilean paper than there have been persons willing to sell gold, and hence the exceptional fall in the gold value of the inconvertible paper has but followed one of the inexorable laws of trade.

The problem of international exchange also has been complicated by the declaration of the Government that a metallic currency would be resumed after a specified period, at the termination of which the Government notes would be converted into gold dollars of the fixed value of twenty-four pence.

Bearing on
the exchange of
the Government
Conversion
Scheme.

At first sight it would seem that such an authoritative declaration ought to have raised the value of the paper money, or at any rate have assisted materially in maintaining its equilibrium.

This, however, has not been the case, and mainly for two reasons.

In the first place, the carrying out of the scheme for the return to a metallic currency involves, until it arrives at maturity, a continual accumulation of gold, and consequently a continual special demand for bills.

Extra
demand for
bills.

If a calculation could be made of the gold required to pay the charges on the foreign debt, to remit the interest on the investments made by foreigners in Chile, to send the money for goods, the payment for which had been held over from the preceding year, to place in their owners' hands the proceeds of securities sold out hurriedly by nervous holders, and to find the stores gradually being accumulated by the Chilean Treasury and the Chilean banks for the eventual conversion of their paper issues, and if this were added to the amount required to pay for the imports of 1893, however greatly these have diminished, and the whole sum were contrasted with the value of the exports during 1893, the serious diminution in the value of the paper dollar during that year would probably be very fully accounted for.

Summary of
causes for the
extraordinary
demand for
gold.

Moreover, in the second place, when considering the effect of the Government Conversion Scheme upon exchange, it should be noted that little genuine confidence in its fulfilment has ever been felt. It is notorious that many people of influence in Chile benefit, at any rate temporarily, by the perpetual diminution of the gold value of the paper currency.

No confidence
in the
Conversion
Scheme.
Forces
adverse to the
scheme.

By this means there is a continuous automatic lowering of wages, and a decrease of indebtedness for that large class of persons who have mortgaged their houses and estates, and have borrowed extensively from the banks.

Even some of the chief Chilean banks regard the conversion scheme with ill-disguised disfavour. Under the present system of currency they guarantee their notes with interest bearing securities.

To guarantee their paper issues with gold would involve the loss of such interest in addition to the present expense of locking up resources in the accumulation of a store of specie.

The result of this lack of confidence in the Government measure has been that probably during the past year the sale of scarcely a single bill has been influenced by the belief that in the course of time the existing paper will be converted into a currency possessing intrinsic value.

Redistribu-
tion of
commerce.

The falling off of the import trade, caused by the curtailment of the nation's power to spend, has been specially felt in Valparaiso. A noticeable feature of the past year has been a certain redistribution of commercial agency.

Valparaiso used to be the one main channel of export and import for the whole of Chile. It is so no longer.

Growing
importance of
Iquique and
Concepcion
with
Talcahuano.

Much of the business formerly transacted there is now done for the mineral district of the north in Iquique, for the agricultural district of the south in Concepcion and its port of Talcahuano.

The further development of the latter town and port in commercial importance is likely to be one of the most marked features in the history of Chilean trade in the immediate future. British enterprise is fully alive to this prospect, and is providing for the future by the erection of five warehouses, by increasing the staffs in the branch houses, by the construction of corn mills, and by promoting facilities for the loading and unloading of vessels.

Moderate
prospect of
activity of
trade in 1894.

The outlook for the coming year cannot be said to be altogether encouraging to the importers, especially to those who feed the central district of Chile through the port of Valparaiso. The harvest has suffered from want of seasonable rain, at any rate in this part of the country, where the area of cultivation cannot be increased as it is being increased in the south.

It is true that there is no special excess of imports for the country to absorb. At the present low prices, however, of wheat and copper and silver, it can hardly be expected that the average income from staple products can be maintained throughout the country.

In the northern mineral zone, of which Iquique is the commercial capital, this falling off in power of expenditure will be least felt. The output of nitrate of soda is likely to be larger in 1894 than in 1893, owing to the breaking up of the combination to restrict production. It is true that this may entail a drop in the price, but the loss from this will fall on the foreign shareholders in the nitrate companies, rather than upon those who derive their means of purchasing imported goods from the work of the extraction and export of the mineral.

It remains to be seen whether the present abnormal expenditure upon gold for conversion purposes will be maintained.

The President of Chile has a strong following in his avowed determination to bring about a return to a metallic currency.

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CHINA.

REPORT FOR THE YEAR 1893
ON THE
TRADE OF FOOCHOW.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1216.

*Presented to both Houses of Parliament by Command of Her Majesty,
JUNE, 1894.*

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1326. Florence	1d.	1384. Constantinople	2d.
1327. Hakodate	1d.	1385. Buenos Ayres	5½d.
1328. Paris	2d.	1386. Caracas	1½d.
1329. Paramaribo	1½d.	1387. Vienna	1½d.
1330. St. Petersburg	2½d.	1388. Madeira	½d.
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CHINA.

FOOCHOW.

Consul Watters to the Earl of Kimberley.

My Lord,

Foochow, March 15, 1894.

I HAVE the honour to enclose herewith a Report on the Trade of Foochow for the year 1893.

I have, &c.
(Signed) T. WATTERS.

Report on the Trade and Commerce of Foochow for the Year 1893.

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Trade Generally.

The total net value of the trade of this port in 1893 stated in sterling was 2,422,098*l.*, and the value of the trade in the previous year was given as 2,646,837*l.* But stated in Haikwan taels the total net value of the trade was 13,840,562 Hk. taels in 1893, while in 1892 it was 12,546,007 Hk. taels. Last year's trade thus
(1746) A 2

shows an increase of 1,294,555 Hk. taels over that of 1892, though the statement of the value in sterling shows a decrease.

Last year was not a prosperous one for the central and northern parts of this province. The crops, especially those of autumn, were much below the average. In the autumn there was a widespread drought of long duration which was very injurious. In some large districts the sweet potato crop, a very important one, was utterly ruined, and in some districts the rice harvest was not gathered. Great poverty and distress resulted, and these were aggravated by the serious rise in the price of rice which followed.

For the purposes of the trade report and returns for 1893 the Hk. tael is counted as equal to 3s. 6d., and in the report for 1892 it was taken as 4s. 2d.

Shipping and Freights.

The shipping returns for 1893 show an increase for that year over 1892 of 11 vessels and 14,404 tons for vessels entering the port. British tonnage rose from 241,543 in 1892 to 250,403 tons in 1893, showing an increase of 8,860 tons. German shipping also showed a marked increase, rising from 8,787 tons in 1892 to 14,725 tons in 1893. The German vessels frequenting the port were all employed in the coasting trade.

In August last, a small steamer named "Pekin" began to run from Hong-Kong to Wenchow, calling at Amoy and this port.

The following information about freights at this port during 1893 has been given by a friend, an old-established British merchant:—

"From the opening of the tea market to the end of the year, freight to London ruled at 2*l.* 10s. per ton of 40 cubic feet. This steadiness was due to an arrangement between shippers and the agents of the regular liners. By this arrangement 10 per cent. on the amount of their contributions was to be returned to all shippers who confined their shipments to these liners. In consequence of this arrangement there were no interlopers, and the regular liners were able to maintain their rate.

"For Antwerp, Hamburg, and the Continent generally, the German mail steamers from Hong-Kong had 2*l.* 10s. per ton, until German competition in July reduced the rate to 1*l.* 15s.

"To Australia the rate of freight was 2*l.* to 1*l.* 15s., and to New York the rates varied from 1*l.* 10s. to 2*l.* 5s."

Imports.

The total value of all foreign imports in 1893 was 835,608*l.*, and of native imports 352,274*l.*, making the total net value of imports for the year, 1,187,882*l.* This shows a falling-off as compared with 1892, which again shows a falling-off from 1891.

Cotton goods. In nearly all the commodities classed under the head, cotton goods, the importation last year was under that of 1892. Shirtings

show a net decrease of 11,645 pieces and Bombay yarn fell off by 614,944 lbs. Many of the native calico-making houses closed last year, and this fact accounts to some extent for the decreased importation of foreign yarn. The stock of native cloth, moreover, was, I am told, far in excess of what was needed. Chinese made cloth has lately been gaining favour in all the districts round Foochow, but it is chiefly local manufacture. The cloth made in the north has not apparently entered much into competition with foreign cotton goods.

In all the items classed as woollen goods there was again a falling off. Beyond this, however, there is nothing in the returns of these imports requiring special notice. Woollens.

In the importation of copper and iron of all kinds, 1893 shows a considerable decrease from the previous year. In lead, however, there was an increase of 668,859 lbs., and in tin also there was an advance. The increase in the importation of lead last year was connected with the improvement in the tea exportation. Metals.

At the beginning of last year the stock of opium was of all kinds, 359½ chests. During the year, the net imports were 4,947·03 piculs (659,604 lbs.). The prices per chest for the year, according to the information kindly communicated by an English firm, were as follows :— Opium.

						Prices.	
						From—	To—
						Dol. c.	Dol.
Malwa—							
New	..	..	..	..	..	510 0	640
Old	..	..	..	..	..	522 50	660
Patna—							
New	..	..	..	..	..	527 50	615
Old	..	..	..	..	..	530 0	615
Benares—							
New	..	..	..	..	..	547 50	630
Old	..	..	..	..	..	555 0	610
Persian	..	..	..	..	..	215 0	640

The net amount of Indian and Persian opium imported in the proper way which was sold for consumption in this district last year was 4,538½ chests, or about 605,000 lbs. It is worthy of notice that while Malwa and Benares show a falling-off as compared with 1892, Patna and Persian show an increase. It is only or chiefly with Patna and Persian that the native drug is mixed, and the amount of opium produced in this district is increasing rapidly. In the Fu-ning Prefecture the revenue derived from the likin on native opium is above 3,500% per year.

The importation of European matches shows a further decrease from 1892, and that of Japanese matches shows a large increase again. The sale of these matches is extending rapidly over all the province. Matches.

Kerosine.

The trade returns for 1892 showed a large advance in the import of kerosine oil over previous years. Last year there was a further increase, the import rising from 640,470 gallons in that year to 1,661,790 gallons. Steamers carrying only kerosine cargo visited this port last year for the first time, and large quantities were thus imported at once. The prices, notwithstanding increased taxation and other obstacles, were moderate.

Rice.

The importation of rice last year into this port was unusually large. It rose from 151,788 cwts. in 1892 to 620,161 cwts. This increased importation was rendered necessary by the total or partial failure of the local rice crops in several districts, and by the loss of the sweet potato crop already mentioned.

Exports.

The total value of native produce passing the Imperial Maritime Customs on exportation in 1893 was 1,234,215*l*. Of this total, exports to the value of 900,112*l*. were for foreign countries, and of the value of 334,103*l*. for Chinese ports. The net exports to Great Britain and the British dependencies were 781,802*l*. In tea there was an increase over 1892, but in nearly all the other exports there was a considerable falling-off.

Tea.

Mr. Westall has with his usual kindness communicated the following notes about the Foochow tea trade in 1893:—"The market opened on June 2, four days earlier than the previous season. Of the quality of the crop generally it may be said that, although finest and choice teas were in smaller supply, it was good; the exceptions being in the produce of the Sueykut and Yung How districts which was poor. The opening tael prices were higher than last season, but, through sterling exchange being lower, shipments were laid down in the consuming markets at about the same cost as in the early part of 1892-93, a cost, as was the case last season, considerably under that of very many preceding years. A feature in the tea trade of this port this season is the increase of supply as compared with the two previous seasons. The falling-off, year after year, without interruption for 12 years previously, pointed to the probability of the trade dwindling away by degrees until it came to an end. Now this falling-off is arrested there is no apparent reason why it should not be turned into an annual increasing supply. All natives interested in the trade have been fairly prosperous the last 2 years, offering every encouragement to them to continue active operations. The figures of supply of the staple kinds, namely, Congou and Souchong, are as follows:—

Season.						Quantity.
						Half chests.
1893-94	..	..	..	..	..	885,000
1892-93	..	..	..	..	..	713,000
1891-92	..	..	..	..	..	740,000

"With the increase of supply there has been a larger export. The following are the figures:—

Country.	Quantity.		
	1893-94.	1892-93.	1891-92.
	Lbs.	Lbs.	Lbs.
Europe	23,796,908	18,002,595	20,336,789
Australia and New Zealand ..	13,047,274	14,540,437	15,307,933
America.. .. .	5,867,394	4,929,533	4,073,048
South Africa	1,611,245	1,641,976	1,246,126
Coastwise, south	8,410,190	4,423,829	4,455,960
„ north	13,561,883	10,541,939	15,040,396
Total	65,794,894	54,080,309	60,460,252

"So much of the shipping of tea of late has been done on commission, under orders from different parts of the world, that merchants here have, on the whole, not had an unprofitable season. But in so far as ventures to London are concerned the balance of results has not been in their favour. Many of the earliest shipments were profitable, the teas being of good quality and cheap, and satisfactory results might have continued had the export not been hurried forward as it was. Three months after the business of the season had commenced, that is to say by the end of August, the shipments amounted to 18,750,000 lbs, as against 11,500,000 lbs. during the corresponding period the previous season. This large increase either temporarily overweighted the London market or caused temporary alarm, and the consequence was a fall in prices and losses to merchants.

"The competition of India and Ceylon is keenly felt, and will be as long as fashion leads to the great mass of consumers in the United Kingdom preferring teas from these countries to those of China growth."

Transit Trade

No outward transit passes to cover native produce from the interior were taken out last year. Two such passes were applied for to cover two lots of oranges, but the applications were cancelled.

The total value of the inland transit trade is put down as valued at 59,012*L*. The total number of passes issued was 4,160, and the goods were distributed over 38 districts in this province. Of these the Fuan district in F'u-ning-foo took 14.61 per cent. of the total value of goods sent inland.

The principal imports sent to the interior under transit pass were cotton goods, including Indian yarn, camlets and long ells of woollen goods, iron wire for making nails, lead, Japanese matches, and kerosine oil.

Of Japanese matches there were 69,500 gross sent to various districts, and no other kinds were sent inland under transit pass.

The total amount of kerosine oil sent under inland transit pass in 1893 was 787,560 gallons, of this total 598,920 gallons were Russian, and 188,640 gallons were American. The increase in the importation of kerosine into the interior over that of 1892 was very notable, in that year only 152,280 gallons having been sent inland under transit pass.

Treasure.

The amount of silver reported to the Imperial Maritime Customs as being imported into Foochow last year was 286,660*l.*, and the total amount of silver exported was 306,130*l.* No gold was imported, but it was exported to the value of 1,319*l.*

Small coins.

Of the subsidiary coins made in the Canton mint 360,000 *dol.* worth was imported by a native banker. About 1,500 *dol.* worth of the above were 5 c. pieces and all the rest were 10 c. pieces.

There are no silver coins made at Foochow, nor is there any machinery for making such at the port.

The local mint makes only the common "cash" of which it turns out about 240,000 per day.

Revenue.

The total revenue collected by the Imperial Maritime Customs last year was 309,374*l.* Of this total the sum of 95,230*l.* was derived from foreign opium. This leaves for the duties on other imports, for the export and coast trade duties, the tonnage and transit dues, a total of 214,144*l.*

In addition to the assistance already mentioned, I must acknowledge my indebtedness for facts and figures to the courtesy of the Commissioner of Customs.

Annex I.—RETURN of all Shipping at the Port of Foochow during the Year 1893.

ENTERED.

Nationality.	Steam.		Sailing.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	200	236,408	30	13,995	230	250,403
Chinese	75	34,451	2	298	77	34,749
German	25	10,433	9	4,292	34	14,725
Others	11	9,175	1	577	12	9,752
Total	311	290,467	42	19,162	353	309,629
„ for the year preceding ...	235	269,424	57	25,801	292	295,225

CLEARED.

Nationality.	Steam.		Sailing.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	200	236,408	32	14,932	232	251,340
Chinese	74	33,388	2	298	76	33,686
German	25	10,433	9	4,292	34	14,725
Others	11	9,175	1	577	12	9,752
Total	310	289,404	44	20,099	354	309,503
„ for the year preceding ...	286	269,984	58	25,878	344	295,862

**Annex II.—RETURN of Principal Articles of Import to Foochow
during the Years 1892–93.**

Articles.		1892.		1893.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Cotton goods—					
Shirtings—					
Grey	Pieces ...	62,765	25,502	53,616	19,737
White	" ...	18,799	12,689	16,302	9,797
T-cloths	" ...	218,559	73,992	172,099	50,092
Drills—					
English	" ...	2,877	1,078	2,572	1,131
American	" ...	4,188	2,493	3,762	2,036
Chintzes and furniture	" ...	7,280	1,976	6,915	1,650
Jaconets, cambrics, lawn,					
muslins, and dimities	" ...	12,155	1,851	11,775	1,472
Turkey-red cloths ...	" ...	14,256	3,890	10,872	2,557
Cotton—					
Handkerchiefs	Dozens ...	6,001	481	6,403	440
Yarn	Lbs. ...	1,739,064	44,521	1,124,120	25,559
Velvets and velveteen ...	Pieces ...	821	1,056	674	729
Cotton lastings, plain and					
figured	" ...	100	79	140	82
Cotton sundries	" ...	...	12,543	...	12,875
Woollen goods—					
Camlets, English	Pieces ...	4,515	8,863	3,705	6,217
Lastings	" ...	2,577	4,362	1,911	2,795
Broad cloth	" ...	448	3,046	427	2,240
Spanish stripes	" ...	2,726	4,985	2,330	3,578
Blankets	Pairs ...	1,975	1,232	1,758	944
Woollen sundries	" ...	...	3,282	...	2,667
Miscellaneous piece goods	" ...	...	1,463	...	658
Metals—					
Copper in various forms	Lbs. ...	179,091	4,228	148,632	2,640
Iron in various forms ...	" ...	3,536,079	23,127	2,063,800	6,879
Lead in various forms ...	" ...	3,986,646	17,076	4,655,605	21,596
Tin in various forms ...	" ...	631,840	23,423	643,175	19,191
Other metals	" ...	642,979	10,454	526,553	5,595
Opium—					
Malwa	" ...	343,817	190,632	324,761	207,340
Patna	" ...	175,865	103,419	189,024	118,253
Benares	" ...	60,539	34,186	34,571	22,109
Persian	" ...	120,514	49,322	131,045	75,130
Foreign sundries—					
Clocks	Pieces ...	2,153	1,007	1,730	567
Window glass	Boxes ...	3,185	1,972	3,392	1,737
Isinglass	Lbs. ...	94,042	3,469	78,364	2,433
Lamps	Pieces ...	20,125	1,801	32,190	1,855
Needles	Mille ...	25,558	910	17,928	590
Matches—					
European	Gross ...	8,707	1,251	5,126	287
Japanese	" ...	113,486	5,535	141,634	5,594
Kerosene oil	Gallons ...	640,470	16,950	1,661,790	29,760
Sugar, white	Lbs. ...	31,502	289	631,933	5,163
Other sundries	" ...	...	187,434	...	168,345
Munitions of war	" ...	...	30,010	...	7,416
Native produce—					
Beans and bean-cake	Lbs. ...	10,953,084	24,642	7,214,869	13,657
Cloth and nankeens	" ...	308,996	2,107	274,647	15,570
Hemp	" ...	956,558	11,662	914,377	9,360
Hats	Pieces ...	918,122	5,701	4,124	328
Raw silk, &c.	Lbs. ...	2,961	747	11,239	3,180
Silk piece-goods	" ...	38,053	30,696	30,344	20,954
Tobacco, prepared	" ...	1,750,812	39,019	1,647,871	33,372
Varnish	" ...	30,723	877	68,505	3,182
Fans	Pieces ...	350,179	1,778	144,434	1,377
Medicine	Lbs. ...	1,124,921	18,908	970,352	12,723
Paper	" ...	129,191	2,459	15,065	325
Rice	" ...	17,000,308	41,659	69,468,068	163,474
Unenumerated	" ...	...	145,070	...	86,160
Total	...	...	1,241,204	...	1,214,011

Annex III.—RETURN of Principal Articles of Export from Foochow during the Years 1892-93.

Articles.		1892.		1893.	
		Quantity.	Value.	Quantity.	Value.
Tea ...	Lbs. ...	48,492,769	1,090,760	54,355,285	967,506
Brick tea ...	" ...	10,653,309	87,562	10,855,733	83,471
Poles...	Pieces ...	387,277	51,222	337,886	49,828
Timber ...	" ...	...	7,414	...	4,734
Oranges ...	Lbs. ...	3,619,710	5,886	5,312,933	8,556
Paper ...	" ...	6,641,276	55,220	8,266,694	13,515
Bamboo—					
Shoots ...	" ...	6,922,972	40,289	5,898,547	31,172
Spills ...	" ...	1,368,468	1,434	1,918,681	1,656
Olives ...	" ...	2,556,848	5,194	876,461	1,620
Other articles ...	" ...	...	60,652	...	82,158
Total ...	...	...	1,405,633	...	1,234,216

Annex IV.—TABLE showing the Total Value of all Articles Exported from, and Imported to, Foochow, to and from Foreign Countries during the Years 1892-93.

Country.	Exports.		Imports.	
	1892.	1893.	1892.	1893.
	£	£	£	£
Great Britain ..	371,265	377,676	613	..
Hong-Kong ..	123,360	172,969	715,911	695,865
India ..	1,812	83	..	..
Straits Settlements ..	4,417	1,875	2,348	1,825
Australia ..	323,845	178,164	..	..
New Zealand ..	8,758	4,568	..	..
South Africa ..	42,544	36,614	..	..
British America ..	8,070	9,853	..	..
Chinese ports ..	375,124	334,103	492,286	486,193
United States ..	110,350	78,975	427	221
Continent of Europe ..	29,964	37,472	9,386	..
Russia via Odessa ..	6,105	1,679	..	10,066
Japan ..	1	169	16,687	19,840
Other countries ..	18	15	3,546	..
Total ..	1,405,633	1,234,215	1,241,204	1,214,010

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1894.
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Nº. 1393.

**DIPLOMATIC AND CONSULAR REPORTS ON TRADE
AND FINANCE.**

CHINA.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF NINGPO.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1235

*Presented to both Houses of Parliament by Command of Her Majesty,
JUNE, 1894.*

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CHINA.

NINGPO.

Mr. Hausser to the Earl of Kimberley.

My Lord,

Ningpo, March 31, 1894.

I HAVE the honour to forward herewith my Report on the Trade of Ningpo, with Returns of Trade and Shipping annexed, for the year 1893.

I have, &c.

(Signed) P. F. HAUSSER.

Report on the Trade and Commerce of Ningpo for the Year 1893.

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The gross value of the total trade of the port during the year 1893 amounted in currency to 15,834,343 Haikwan taels, an increase of 1,789,583 Haikwan taels as compared with the previous year. These figures must not, however, be taken as indicating any general expansion in the trade, for imports show a falling-off in (1772)

quantity under nearly every head, their higher value being merely the result of the enhanced silver prices assigned to them in the returns. On the other hand, exports were considerably above the average, and the principal feature of the year's trade may thus be summarised as a general shrinking in imports, with a marked improvement in exports, the net result being, in fact, fairly represented by the sterling values in the following table:—

Description.	Currency.		Sterling.			
	1893.	1892.	1893.*	1892.†	Increase.	Decrease.
	Hk. Taels.	Hk. Taels.	£	£	£	£
Foreign imports ...	7,028,508	6,723,068	1,347,131	1,470,671	...	123,540
Native imports ...	2,339,040	2,262,849	448,316	494,998	...	46,682
Exports ...	6,288,626	4,944,334	1,205,320	1,081,573	123,747	...
Re-exports ...	178,169	114,509	34,149	25,049	9,100	...
Total... ..	15,834,343	14,044,760	3,034,916	3,072,291	...	37,375†

* Haikwan tael = 3s. 10d.

† Haikwan tael = 4s. 4½d.

‡ Net decrease.

The average exchange for the year is throughout taken at 3s. 10d. to the Haikwan tael, and at 4s. 4½d. for the previous year.

Shipping.

Shipping.

The returns of shipping again show a decrease as compared with the figures for the previous year, 1,054 vessels, representing a tonnage of 918,288 tons, having entered and cleared during the year, as against 1,161 vessels, with an aggregate tonnage of 988,859 tons, in 1892.

In shipping under the British flag there was a decrease of 74,123 tons, the number of steamers entered and cleared having fallen from 391 in 1892 to 324 in 1893, whilst British sailing vessels have finally disappeared from the returns altogether. Steam shipping under the Chinese flag also showed a falling-off in number, with, however, a slight increase in tonnage, and there was a trifling reduction under the head of native sailing vessels of the lorcha type. Of other flags the only representatives during the year were 1 German and 3 Norwegian steamers.

As in 1892, the steam-carrying trade between this port and Shanghai was fairly divided between the vessels of the China Merchants and China Navigation Companies, running on alternate days. Of the total tonnage employed the share that fell to British shipping was over 43 per cent.

Imports.

Imports.

The gross value of foreign goods imported during the year was 1,347,131£, of which 54,486£ came from Hong-Kong; 30£ from Great Britain, transhipped at Shanghai; 3,908£ from foreign countries; and 1,288,707£ from Chinese ports.

Native produce was imported to the value of 448,316*l.*, chiefly from Shanghai, Hankow, and Canton.

The gross importation of opium was lower than in any year since 1887, having fallen to 779,866 lbs., a decrease of 50,267 lbs. as compared with 1892. This is attributed, not to any diminished demand, but to the fact that, owing to a short import, Indian opium was not procurable at Shanghai, whence all supplies for this port are drawn, except at enormously enhanced rates. The price of Malwa, the only variety in vogue here, ranged between 390 taels and 560 taels; that of Patna, which shows an increased import of 5,733 lbs., from 390 taels to 450 taels; and similar rates for Benares. Of Persian opium only 667 lbs. were imported in 1893, against 8,666 lbs. in 1892. The fluctuations in the import of the latter depend to a great extent on the reports current as to its quality, which is said to be highly variable from year to year. If more than usually hot in the mouth, it cannot so well be passed off as Malwa, but is otherwise supplied instead of the latter to the poorer class of consumers, being some 20 per cent. cheaper.

The quantity of native opium passing through the Imperial maritime customs was only 2,133 lbs., or 400 lbs. less than in 1892. These figures are of little value, the quantity arriving by land route and otherwise smuggled into the port being certainly very considerable. Ssüchuan drug was quoted at rates averaging 480 dol. per picul, and that from Tangshan, in Kiangsü, at 420 dol. per picul. Opium grown in the Taichow and Hsiangshan districts of this province fetched 320 dol. and 350 dol. per picul respectively, showing a slight increase on the prices of 1892, due to an exceptionally short crop.

The importation of cotton goods fell from 888,975 pieces in 1892 to 639,800 pieces in 1893, the lowest figures recorded for 8 years. The import of 1892 was, however, exceptionally large, and considerable stocks remained in the hands of the dealers at the close of that year, whilst in 1893 the demand was further materially affected by the general increase in cost. The business done, though small, was very successful, and importers realised good profits on a continually rising market.

The principal falling-off was in grey shirtings, the import of which fell in 1893 to 365,567 pieces, a decrease of 116,098 pieces. White shirtings, Irishes, T-cloths, American drills, jeans, and sheetings, both English and American, all show large decreases.

In cotton yarn (English) there was a reduction of 800 lbs. on the trifling import of 13,600 lbs. for 1892, whilst Indian yarn fell from 2,245,600 lbs. in that year to 1,019,200 lbs. in 1893. On the other hand, there was an import from Japan of cotton yarn 2,800 lbs., and of cotton cloth 3,296 pieces, value 613*l.*, as compared with 930 pieces in the previous year.

Indian T-cloths appear for the first time in the returns for 1893, the import having been 520 pieces, valued at 80*l.*

The only articles which show any considerable advance are drills, English and Dutch (increase of 3,275 pieces), and towels, (1772)

which have risen from 3,786 dozen in 1892 to 9,617 dozen in 1893.

Native cotton cloth.

The import of native cotton cloth (drills and sheetings) manufactured by the Shanghai Cotton Mill Company, amounted to 4,105 pieces for the 10 months of the year during which the mill was working prior to its destruction by fire, and of Chinese cotton yarn to 2,000 lbs. as compared with 4,726 pieces of cotton cloth and 14,000 lbs. of yarn imported during the preceding 12 months.

Woollen goods.

The average demand of late years for woollen goods was fairly maintained, but the small returns show no signs of any expansion. Twenty years ago the import was more than treble the present quantity.

Metals.

The principal metals imported are iron nail-rod and bar, tin, and lead. All these items show a trifling decrease. This port being a somewhat important centre of the junk-building industry, there is always a certain demand for nail-rod iron. The consumption of tin and lead is also more or less constant, the former being used in large quantities by the tin-foil workers of Shaohsing and Hangchow, and the latter for the linings of tea-chests.

Sundries.

Among sundries, the principal articles of import are kerosene oil, medicines, matches, rice, sugar, mangrove bark, wood oil, gypsum, vegetable oil, and indigo.

Kerosene.

2,099,370 gallons of kerosene were imported during 1893, viz., 2,067,870 gallons of American, and 31,500 of Russian oil. The total was thus less than in either of the preceding years, but higher than in any year previous to 1891. The decreased import may be accounted for by the action of a syndicate of oil dealers here, and at Shanghai, between whom and the lorcha owners an agreement was entered into that no oil should be shipped to Ningpo in these vessels, except for members of the ring. As the regular steamers running on the Shanghai-Ningpo line altogether refuse to carry kerosene, a virtual monopoly of the business was thus secured, and prices gradually rose till a margin of 20 c. per case was reached. At this figure it became profitable for outsiders to ship by the Wenchow steamer, which calls en route at Ningpo, importers paying the same freight as on cargo for Wenchow. Hankow lorchas were also brought into play, and the ring was consequently broken up towards the close of the year. That under these circumstances the import should have been so well maintained may be taken as an indication that, with unrestricted trade, the figures of 1892 would in all probability have been considerably exceeded.

Rice.

The import of rice came to over 12,000 tons, or apparently more than double that of 1892. The quantity actually imported was, nevertheless, not in excess of former years, but it appears that, owing to the prevalence of piracy in the Chusan Archipelago, natives were afraid to ship by junk. Hence a larger proportion than usual was carried by steamers, thus coming under the cognisance of the foreign custom-house.

Native medicines form a surprisingly large item in the trade of the port, no less than 77,525*l.* worth having been imported during the year, mostly from Hankow, the chief seat of the trade, in addition to an export valued at 47,577*l.* Medicines.

There is also a small business done in certain well-known foreign remedies, such as quinine, morphia, castor-oil, cod-liver oil, chlorodyne, and the like, a business capable of indefinite expansion were the prejudices of the Chinese with regard to the use of foreign drugs once overcome.

The import of sugar (brown and white) amounted to 10,492 tons, being an advance of 2,466 tons over that of 1892. Of this total 2,065 tons of brown sugar and 4,908 tons of white came from Hong-Kong, being classed among imports from foreign countries. In the early part of the year prices ruled high, rates throughout varying from 3 dol. to 5 dol. per picul for Swatow brown; Tainan brown, 4 dol. to 6 dol. per picul; and Hong-Kong refined 7 dol. 40 c. to 9 dol. per picul. Native sugar from Chinchew is in great favour here, its consumption being mainly confined to this port, but was this year very scarce, averaging 10 dol. 50 c. per picul. The preference shown for this variety is ascribed to its light weight as compared with Formosan and other sugars of similar quality. Sugar.

Mangrove bark is always in good demand for dyeing sails and fishing-nets. The import was slightly less than in the previous year. Mangrove bark.

Matches show an increase of 83,000 gross on a total import of over 375,000 gross. Of these 328,000 gross came from Japan, 30,000 gross were of native, and 17,000 gross of European manufacture. Matches.

Among other sundries imported were aniline dyes, value 3,633*l.* against 1,545*l.* in 1892; condensed milk, 1,155 dozens of tins; flour, 8,376 cwts., an increase of 1,783 cwts.; and needles, 53,592 mille. Aniline dyes.
Condensed milk.
Flour.
Needles.

Exports.

The value of exports of local origin, which in 1892 amounted to 4,944,334 Haikwan taels, rose in 1893 to 6,288,626 Haikwan taels, an increase of over 27 per cent., towards which tea and cotton alone contributed more than 1,250,000 taels. It is necessary to state these values in currency, in order to prevent misapprehension, for when converted into sterling exports show only the nominal increase of 123,747*l.*, their total value being 1,205,320*l.* in 1893, against 1,081,573*l.* for the previous year. Exports.

At an early period of the year it was believed that the tea plantations had been irretrievably damaged by the unusually severe cold of the winter of 1892-93, but the result has not justified these anticipations. The export of green tea for 1893 was, in fact, above the average in quantity, the total shipments having amounted to 24,503,333 lbs. as compared with 21,665,733 lbs. during the preceding year. A good deal of this increase is Tea.

accounted for by the large stocks remaining on hand at the close of the previous season, which were not sent forward till the beginning of 1893.

The first shipments of the season, consisting of 7,000 chests, were despatched as usual during the first week in June, and paid fairly well, the quality being on the whole good. Later teas were of inferior quality, and considerably adulterated, the result being that of the 30 odd native hong engaged in the Pingsuey tea trade not more than four or five made any profits on the year's business. The rest are reported to have all lost sums varying in each case from 5,000 dol. to 8,000 dol. Average prices were, for medium, 17 taels to 18 taels per picul, 22 taels to 23 taels for good, and 34 taels to 35 taels for choice qualities.

Fychow teas did well all round with a reduced export, profits ruling 2 taels to 3 taels per picul, at an average price of $23\frac{1}{2}$ taels per picul.

Cotton.

The enormous increase in the export of raw cotton is one of the principal features in the trade of the port for 1893, the export being more than double that of 1892. Owing to the demand anticipated for mills in Japan, the cultivation had been largely extended throughout this district, whilst the steady dry weather of autumn enabled over 90 per cent. of a full crop to be gathered. The following figures show the expansion of this branch of the export trade during recent years:—

Year.						Quantity.
						Lbs.
1885..	..	..	..	..	..	857,866
1886..	..	..	..	..	..	701,200
1887..	..	..	..	..	..	1,550,400
1888..	..	..	..	..	..	1,145,333
1889..	..	..	..	..	..	2,083,333
1890..	..	..	..	..	..	3,395,466
1891..	..	..	..	..	..	3,765,333
1892..	..	..	..	..	..	6,641,467
1893..	..	..	..	..	..	13,282,133

In addition to the quantity shipped by steamer, over 6,000,000 lbs. were exported by junk to Foochow and southern ports.

Alum.

There was an export of alum amounting in all to 5,467 tons, valued at 14,084*l*. This article is obtained from Fan Shan, near the borders of the Fukien province to the south of Wenchow, and is brought by junk to Ningpo, where greater facilities exist for its exportation by lorcha than are to be found at the former port, its natural outlet, considerable quantities are used by the dyers of this district.

Cuttle-fish.

The export of cuttle-fish was 1,027 tons less than in 1892, the yield having been exceptionally small.

Rush hats.

Rush hats of 1 and 2 braid show a falling off, which, however, is more than counterbalanced by the increase in the numbers of 3 braid.

With the exception of tea, cotton, and silk piece-goods, the staple exports from Ningpo consist of articles of little intrinsic value and of little interest to foreign merchants.

Transit Trade.

The number of inland transit passes taken out during the year was 23,427, covering goods to the value of 215,238*l*. The principal articles conveyed into the interior were:—

Articles.					Quantity.
Grey shirtings	..	..	..	Pieces	97,115
T-cloths	..	..	..	"	63,325
Iron	..	..	..	Tons	1,584
Matches	..	..	..	Gross	97,400
Kerosene	..	..	..	Gallons	488,020
Sugar, white and brown	..	..	..	Cwts.	107,424*

* Or over 50 per cent. of the total import.

General.

The steam cotton mill to which reference was made in last year's report has again proved very remunerative to the proprietor. The profits for 1893 admittedly amounted to some 10,000 dol. and were probably far more.

Supplies of the raw article were plentiful, and the demand for the manufactured remained steady, whilst the market was altogether free from violent fluctuations. The mill can work up to 10,000 bales per month, and sale prices ranged from 17 dol. 60 c. to 18 dol. 50 c. per bale of 120 catties cleaned cotton, uniformly fetching 20 c. to 40 c. per bale more than that prepared by hand-power machine.

The success that has attended this undertaking has led the proprietor to embark further in a yarn spinning mill, which is expected to be in working order by the end of the year. It will be remembered that a similar project had previously been abandoned on account of the opposition of the hand workers, which induced the authorities to withhold their sanction.

Official opinion with regard to the interference of such an industry with the "means of livelihood of the people" seems since then to have undergone considerable modification. A large piece of land has now been acquired closely adjoining the present concern, and it is understood that orders for machinery, &c., have already been placed in Shanghai, though exact details are not obtainable at present. An establishment for the manufacture of cotton cloth is also projected, and will doubtless be taken in hand on the completion of the yarn mill.

Early in 1893 the preliminary steps were taken for the erection of a much needed lighthouse on the Hieshan Islands, a

Lighthouse at
Hieshan
Islands.

group lying some 15 miles off the coast, midway between this port and Wênchow. Coasting vessels bound for Shanghai from the south have long felt the want of a light at this point to signal the approach to the Chusan Islands, there being at present no light on the whole stretch of coast from the Middle Dog Light off Foochow until the Chusan group is reached. It has been decided to erect the lighthouse on the island known as Pei Zü Shan, and the light is to be a revolving light of the first order. The new lighthouse, it is anticipated, will be completed by the end of the present year (1894).

Piracy. Piracy, always more or less prevalent along the seaboard of this province, was unusually rife during the past year. Official returns for the first 6 months of 1893 show a total of 59 pirates killed and taken prisoners by the Government cruisers and gun-boats stationed in this port.

Use of electric launches in inland waters. Among the inquiries addressed to this office during the year by merchants and manufacturers at home was one with regard to the possible use of electric launches on the inland waters of this district. Peculiarly adapted as these are for smooth-water vessels of light draught, and considering the success that has attended the introduction of steam launches for native traffic at certain of the treaty ports, the suggestion certainly seems attractive at first sight. So far, however, it does not appear to have occurred to anyone that it would be either feasible or profitable to run steam launches here in competition with the native passenger boats, and it is questionable whether electric launches would afford any better prospects of success.

Decline of foreign interests. The steady decadence of foreign interests in the port is shown by successive transfers of foreign-owned property and real estate to native hands. The existence of the native guilds has done much, and the absence of direct communication with foreign countries, has perhaps done more to bring about this state of things, which, under present conditions, is not likely to improve.

For the statistics annexed to this report, and for other information, I am indebted to the courtesy of the Commissioner of Customs.

Annex A.—RETURN of all Shipping at the Port of Ningpo during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	162	201,061	162	201,061
Chinese	143	18,824	215	236,834	358	255,658
German	...	...	1	588	1	588
Norwegian	...	...	3	1,369	3	1,369
Total	143	18,824	381	439,822	524	458,646
„ for the year preceding ...	158	22,000	424	472,493	582	494,493

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	162	201,061	162	201,061
Chinese	149	19,820	215	236,834	364	256,654
German	"	"	1	558	1	558
Norwegian	...	...	3	1,369	3	1,369
Total	149	19,820	381	439,822	530	459,642
" for the year preceding	154	21,072	425	473,294	579	494,366

Annex B.—RETURN of Principal Articles of Export from Ningpo during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Paper fans	Pieces ...	2,420,717	£ 13,919	2,012,835	£ 13,968
Rush hats	" ...	2,614,200	8,071	2,129,500	3,499
" mats	" ...	1,193,075	22,567	1,106,679	24,209
Tea, green	Lbs. ...	24,503,333	752,397	21,665,733	703,504
Cotton, raw	" ...	13,282,133	192,539	6,641,467	93,585
Cuttle fish	Tons ...	1,092	20,232	2,119	33,375
Silk piece-goods ...	Lbs. ...	59,704	42,912	43,320	31,136

RETURN of Principal Articles of Import at Ningpo during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Opium	Lbs. ...	779,866	£ 585,545	830,133	£ 546,607
Cotton goods	Pieces ...	639,800	273,084	888,975	398,944
Woollen goods	" ...	12,416	18,505	13,451	21,811
Iron, nail-rod and bar ...	Tons ...	1,421	8,365	1,928	11,368
Tin, in slabs	" ...	1,452	125,146	1,512	145,107
Kerosene oil	Gallons ...	2,099,370	48,260	2,129,160	54,929
Sugar, white and brown	Tons ...	10,492	127,362	8,026	97,769
Matches	Gross ...	375,165	12,800	274,101	10,309
Shanghai mill cotton cloth	Pieces ...	4,105	1,900	4,726	2,688

NOTE.—Haikwan tael was equivalent to 3s. 10d. in 1893, and 4s. 4½d. in 1892.

Annex C.—TABLE showing Total Value of all Articles Exported from and Imported to Ningpo from and to Foreign Countries during the Years 1893–92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	..	..	30	4
Hong-Kong	6,731	2,521	54,486	29,815
Singapore and Straits..	..	..	..	12
Continent of Europe,				
Russia excepted ..	..	..	..	228
Japan	..	..	3,904	3,277
America	..	..	4	..
	6,731	2,521	58,424	33,336

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DIPLOMATIC AND CONSULAR REPORTS ON TRADE
AND FINANCE.

CHINA.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF CHINKIANG.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1228.

*Presented to both Houses of Parliament by Command of Her Majesty,
JUNE, 1894.*

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1292. Trieste	1½d.	1350. Jerusalem	1d.
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1325. Resht.. ..	3½d.	1383. Naples	1½d.
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CHINA.

CHINKIANG.

Mr. Carles to the Earl of Kimberley.

My Lord,

Chinkiang, March 19, 1894.

I HAVE the honour to forward herewith my Report on the Trade and Commerce of this Port for the year 1893.

I have, &c.

(Signed) W. R. CARLES.

Report on the Trade and Commerce of Chinkiang for the Year 1893

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Comparative
table of
imports and
exports for
1892-93.

The following table gives the comparative values in sterling* of imports and exports at the port of Chinkiang during the years 1892-93 :—

Description.	Value.	
	1892.	1893.
	£	£
Net total foreign imports.	2,154,568	1,922,227
“ native “ “	985,296	951,601
Total exports	551,114	537,740
Net value of trade	3,690,973	3,411,568

Steady
advance in
trade of port.

But sterling values alone are misleading as to the actual trade of the port which is purely in silver. The customs returns for the past year show an advance on 1892 of more than 375,000 Haikwan taels. The advance has been continuous since 1889, amounting in the 4 years to almost exactly 5,000,000 taels.

Decline in
British
imports.

The trade, however, in the past year has been unsatisfactory from a British point of view, for though the falling off of foreign imports in 1893 is less than 150,000 taels, British manufactures and especially cotton goods show a marked decrease, which is further accentuated by a falling off in the import of Indian yarn. There has been a slight recovery in Indian opium, and an improvement in English drills, together with an advance in steel, but the steadiness of the total of foreign imports is mainly due to increased importation of American kerosene oil, of Japanese matches, and of sugars of Chinese origin.

Foreign
cotton piece-
goods.

The fall in the value of silver has seriously injured the trade in foreign cotton goods, as Chinese refuse to pay any considerable advance on the silver prices to which they have been accustomed. Chinese dealers in foreign piece-goods are beginning to suffer from this, and some of them have had to close their places of business. The full effect on foreign trade will be more fully appreciated when the native cotton mills are at work at Shanghai.

* The average value of the Haikwan tael in 1892 was 4s. 4½d.; in 1893, 3s. 11½d.

and elsewhere, for these mills in addition to other advantages are favoured in point of taxation.

The cloth made by the Shanghai cotton mills paid no duty if consumed in Shanghai, but if exported to another treaty port paid one full duty, which cleared it of all further taxation, special transit certificates being issued by the company for the purpose. The advantage thus held by the Shanghai cotton mills, owing to their semi-official status, has hardly yet been fully felt, as the mills were accidentally burnt down at the time when the output was beginning to promise well. But the cotton mills at Wu Chang are reported to possess similar privileges, which will doubtless enable them, if properly conducted, to compete favourably with European factories.

Even already the importation of grey shirtings has fallen from 1,186,805 pieces with a value of 556,293*l.* in 1890 to 799,473 pieces with a value of 299,052*l.* in 1893; and of white shirtings in the same period from 132,425 pieces with a value of 82,739*l.* to 78,993 pieces with a value of 40,434*l.* Almost all other cotton goods, with the exception of drills, have suffered and for the most part in like proportion.

The import of Indian yarn in 1893, which in 1892 counter-balanced the falling off in cotton goods, fell from 101,064 cwts. in 1892 with a value of 388,161*l.* to 80,791 cwts. with a value of 217,828*l.* The decrease in the import of Indian yarn has been continuous throughout the year, except in the July to September quarter, and cannot therefore be ascribed to the financial measure taken by the Indian Government. The brisk movement in the September quarter is assigned by native merchants to the Chinese being alarmed at the fall of exchange and apprehension of a further fall. Further, merchants who come from the interior to buy yarn do not arrive much before May. There is but little local consumption of Indian yarn; the amount conveyed into the interior under transit pass almost equals the whole quantity imported.

Of woollen goods there has also been a decreased importation, but the trade has never been of much importance.

Among metals, steel is the only article which shows a considerable advance, rising from 3,880 cwts. with a value of 2,483*l.*, to 15,683 cwts. with a value of 8,761*l.*

Sundries, a class which includes many articles not of British origin, show more favourable figures.

The import of American kerosene oil has risen from 1,520,670 gallons in 1892 to 2,767,380 gallons. This is partly counter-balanced by a decrease of 500,000 gallons in the import of Russian oil.

Matches have risen from 513,025 gross in 1892 to 678,200 gross in 1893; sugars from 467,621 cwts. with a value of 314,777*l.*, to 525,294 cwts. with a value of 338,773*l.*; sandal wood and bêche-de-mer also show an improvement. Coal to the value of 23,152*l.* was imported from Hongay.

The import of Indian opium has risen from 2,984 chests in (1761)

1892 to 3,369 chests in 1893, the increase being mainly in the last quarter of the year, but steadily growing throughout the year. At the same time prices advanced from 385 taels per chest for Malwa in January to 480 taels in December.

In my last report I mentioned that the customs had taken steps to prevent Indian opium adulterated in the port from being sent inland under foreign opium certificates, and that native dealers prophesied that this action was likely to have a serious effect on the importation of Indian opium. I added that as the adulterated opium to some extent supplanted Indian opium, there was good reason to look for the contrary result. It may, I think, in some measure be due to the action of the customs that the import of Indian opium has increased, after a steady decline which has only once been interrupted since 1879. The shortness of the local crop, however, is mainly responsible for the improvement.

Local crop
deficient.

Native Imports.

Opium.

Some 25 cwts. of native opium from Sze Chuen also passed through the foreign custom-house. Such opium is liable to a duty of 20 taels per picul at Chungking, and to another of 40 taels per picul at Ichang. These payments properly exempt it from all further taxation, but the unfortunate importers to Chinkiang find that the rule is not strictly observed in this province. Payment of another 35 taels per picul has been demanded on two packages sent hence to Nanking, and some other packages sent hence to Kiang-Yin have experienced a similar fate. The Taotai of Chinkiang has, I understand, in both cases protested, but without avail, against the action of the likin authorities, who attempt to justify themselves by an illegal informality on the part of the customs at the port of export.

Native
imports
increased.

Native imports show an advance of over 300,000 taels on 1892, to which wood oil, beans, sugars, wood poles, and coffin woods have contributed. Nearly three-fourths of the native imports come from Hankow; Swatow sends a little over 11 per cent., and Shanghai rather more than 8 per cent. of the whole.

Beans.

The large quantity of beans imported from Hankow is mainly of the kind known as yellow beans, which are used for the manufacture of oil and bean curd; the beans exported from Chinkiang, chiefly to Canton, are used either as a vegetable, when the shoots have sprouted, or as flour for cakes.

Exports.

In exports there is an increase of 200,000 taels, in which beans, ground-nut oil, sesamum seeds, straw braid, goat skins, and wheat take part. The falling-off in lily flowers, which is one of the staple articles of export from Chinkiang, is very considerable, and the export of ground-nuts has not reached the dimensions

attained in 1892. Silk piece-goods still continue to be of small value, though Nanking and Chang-chau are famous for their silks and velvets.

Shipping.

The total tonnage of shipping entered and cleared in 1893 is 3,236,838 tons as against 3,163,367 tons in 1892. The percentage of British shipping was 65·98 (a slight increase); of Chinese 27·79; the tonnage under other flags (Austrian, German, and Russian) being only 6·23 per cent. The proportionate value of the total cargo was 54·91 per cent. in British bottoms, and 43·31 in Chinese.

In the autumn of 1893 the different steamer companies trading on the Yangtze, after 4 years of competition by reduced rates, came to terms and agreed to raise rates for freight and passengers, the former from 25 to 40 per cent., and the latter about 100 per cent. It is difficult for outsiders to understand why such an arrangement was not come to earlier. The number of passengers to and from Chinkiang in 1893, despite the increased rates, was 167,420 as compared with 145,999 in 1892. The examinations at Nanking are accountable for a large number, but it was a very noticeable fact that an immense number of the students and their servants passed down in native craft. As regards freights, the steamer companies have been exceptionally fortunate during the winter, the amount of tonnage being insufficient for the demand.

The year generally has been a very good one in the Chinkiang district. Locusts, whose return was greatly feared, were destroyed by heavy snows and hard frosts in the early part of 1893. The low country in the immediate neighbourhood of Chinkiang and the river presented a pitiful sight in autumn when the rice harvest was being got in. On account of heavy and continuous rains in August and the first part of September, men and women knee deep in water were pushing bundles of rice in the straw through the water to the nearest dry land. Illness was so rife that in many parts labour was not obtainable. But the district is so large and varied that what meant loss of the harvest in some places brought plenty elsewhere, and on the whole about a ninth crop was gathered in. The increased import of luxuries such as Indian opium, bêche-de-mer, window glass, &c., indicates a greater degree of comfort and prosperity, which is also testified to by the absence of anti-foreign disturbances.

The condition of this harbour has been very greatly affected of late by the tendency of the river to flow towards the north bank. Within the last 12 years, in the upper harbour, a depth of 1,200 yards has been eaten away, and there is now a depth of over 130 feet of water in some places which 12 years since formed part of the river bank. The portion opposite the concession is now threatened, and if that is washed away, the silting up off the concession bund, which has been steadily proceeding for some years past, will probably be much more extensive and rapid. On

Increase in tonnage.

Passenger and freight rates raised.

Crops good in spite of partial distress.

Absence of anti-foreign disturbances.

Changes in harbour.

the other hand, a slight deflection of the river's course in the higher reaches would soon re-establish the old state of things.

Talk of
introduction
of water-
works.

There has been much talk among Chinese of establishing waterworks at different cities on the Yangtze, and the advantages which Shanghai gains from the establishment of its Waterworks Company are frequently referred to and fully recognised. There are vested interests such as those of water porters and the like, which are opposed to the introduction of similar enterprises elsewhere, but the gentry at places like Yang Chau, Nanking, and Chinkiang know how to overcome such opposition when it suits their purpose. Any such schemes will undoubtedly be worked by native capital, and there will be some hesitation before money is invested in such an enterprise, in some degree under official control, unless the investors are satisfied that the results ought to be satisfactory, financially and otherwise, and at present I have not heard of any scheme taking such definite form as even an estimate of the cost.

The present Viceroy at Nanking is understood to be opposed to the inception of any waterworks for domestic purposes, but there are many officials who hold opposite views, and public opinion is as strong a factor in China as elsewhere, though very slow in exercising its strength.

Foreign
settlements
offer good
medium for
advertising
foreign
appliances.

Waterworks, fire-engines, and hydrants appear to have a field open to them in the future on account of the universal favour which those in use at Shanghai have won. It is, I am convinced, by introduction of such appliances into use among the foreign communities in China that manufacturers will best advertise their goods, unless they go to the expense of sending out special agents to open exhibition yards and supervise machinery in work. There is no worse advertisement than an engine or piece of machinery lying in a Chinese house or yard, and which the purchaser is unable to work properly because of his insufficient knowledge of it. When Chinese see that Europeans adopt foreign appliances instead of using human labour, and thereby secure economy and efficiency, they are not unwilling to follow the fashion set. But circulars, though sent out to China by the ton, seldom, I fancy, secure any native customers.

Safety
kerosene
lamps.

There are few novelties which occur to me as worth suggesting to importers, but cheap reversible safety-lamps, for kerosene oil, are almost certain to find favour, and if their safe qualities were thoroughly proven, they might eventually oust the present type altogether, for the numerous fires which arise from accidents with ordinary lamps lead to constant attempts on the part of the officials to prohibit their use.

Obligations to
customs.

I am indebted to the commissioner of customs, M. Rocher, for access to the returns of his office before their publication, and to the harbour master, Mr. Howard, for information regarding changes in the river's course.

CHINKIANG.

7

Annex A.—RETURN of Principal Articles of Import from Chinkiang during the Years 1893–92.

Articles,			1893.		1892.	
			Quantity.	Value.	Quantity.	Value.
				£.		£
Foreign—						
Opium	Chests	...	3,369	323,206	2,984	302,762
Shirtings—						
Grey	Pieces	...	799,473	299,062	1,013,965	397,347
White	"	...	78,993	40,434	110,682	60,241
Dyed	"	...	9,595	5,288	12,689	7,459
Figured, brocaded, or spotted	"	...	12,819	7,319	21,043	16,608
T-cloths	"	...	106,260	27,197	123,850	33,567
Drills, English	"	...	56,925	22,067	42,870	20,533
Sheetings, English	"	...	65,880	32,444	76,588	41,684
Yarn, Indian	Cwts.	...	80,791	271,828	101,064	388,161
Iron, nail-rod	"	...	50,510	20,046	66,118	23,606
Bêche-de-mer	"	...	3,216	21,282	2,556	18,696
Matches	Gross	...	678,200	25,693	513,025	21,372
Oil, kerosene—						
American	Gallons	...	2,767,380	52,957	1,520,670	31,864
Russian	"	...	688,000	12,474	1,175,950	23,180
Sandal wood	Cwts.	...	33,610	34,674	30,211	37,672
Sugars	"	...	525,294	338,773	467,621	314,777
Native—						
Beans	"	...	404,100	100,241	223,855	65,505
Coal	Tons	...	18,375	23,152	17,288	24,088
Grass-cloth	Cwts.	...	4,183	24,946	4,119	26,140
Oil, wood	"	...	202,627	197,707	167,159	184,164
Sugars	"	...	163,883	116,133	164,083	103,857
Tallow, vegetable	"	...	74,000	90,560	87,478	115,242
Tobacco	"	...	72,717	90,164	87,893	129,709
Wood—						
Poles	Pieces	...	215,218	84,741	192,478	83,808
Coffin	"	...	206,281	22,746	165,678	20,637

Annex B.—RETURN of Principal Articles of Export from Chinkiang during the Years 1893–92.

Articles,			1893.		1892.	
			Quantity.	Value.	Quantity.	Value.
				£		£
Beans	Cwts.	...	206,020	61,104	143,955	42,161
Ground-nuts	"	...	228,794	56,752	270,063	69,150
Lily flowers	"	...	69,867	56,211	104,623	145,949
Oil, ground-nut	"	...	41,020	30,524	34,605	29,743
Rice	"	...	148,801	31,988	182,898	43,488
Seeds—						
Melon	"	...	32,733	21,109	42,620	35,998
Sesamum	"	...	243,914	96,809	158,095	75,478
Silk piece-goods	"	...	973	56,294	976	62,536
Straw braid	"	...	2,804	23,180	630	6,858
Skins, goat	Pieces	...	698,657	14,765	496,012	8,355
Wheat	Cwts.	...	189,822	31,317	160,776	29,404

**Annex C.—RETURN of all Shipping at the Port of Chinkiang
during the Year 1893.**

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	18	8,787	1,036	1,058,998	1,054	1,067,785
Chinese	840	118,551	274	331,632	1,114	450,183
Austrian	...	...	46	36,640	46	36,640
German	...	...	37	34,490	37	34,490
Russian	...	...	12	29,744	12	29,744
Total	858	127,338	1,405	1,491,504	2,263	1,618,842
„ for the year preceding ...	737	106,832	1,346	1,474,818	2,083	1,581,650

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	18	8,787	1,036	1,058,998	1,054	1,067,785
Chinese	832	117,705	274	331,632	1,114	449,337
Austrian	...	...	46	36,640	46	36,640
German	...	...	37	34,490	37	34,490
Russian	...	...	12	29,744	12	29,744
Total	850	126,492	1,405	1,491,504	2,255	1,617,996
„ for the year preceding ...	740	106,899	1,346	1,474,818	2,086	1,581,717

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1894.

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DIPLOMATIC AND CONSULAR REPORTS ON TRADE
AND FINANCE.

CHINA.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF TAMSUI.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1093.

*Presented to both Houses of Parliament by Command of Her Majesty,
JUNE, 1894.*

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CHINA.

TAMSUI.

Acting-Consul Hopkins to the Earl of Kimberley.

My Lord, *Tamsui, March 22, 1894.*
 I HAVE the honour to forward herewith my Report on the
 Trade of Tamsui and Kelung for the year 1893.
 I have, &c.
 (Signed) L. C. HOPKINS.

*Report on the Trade and Commerce of Tamsui and Kelung for the
 Year 1893.*

ABSTRACT of Contents.

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(1759)	A 2

Gross trade. In a year of almost universal trade depression North Formosa has prospered. The gross value of the trade of Tamsui and Kelung was in 1893 the largest on record, and amounted in sterling, reckoning the Haikwan tael as equivalent to 3s. 11d., to 3,543,207*l.*, an increase over the previous year's figures, in spite of a fall of 5*d.* in the gold value of the Haikwan tael, of 287,347*l.* This increase over the preceding year is exhibited in both imports and exports. In 1888, however, the former category was higher by 6,320*l.*, the tael then standing at 4s. 8*d.* The following table shows the totals of imports and exports for the 2 years:—

TABLE showing Comparative Value of Imports and Exports during the Years 1893–92.

				Value.		
				1893.	1892.	Increase in 1893.
				£	£	£
Imports..	..	..	..	610,114	513,228	96,886
Exports..	..	..	..	933,093	742,632	190,461

Imports.

Opium. Examining Table 2, in which imports are classed in the groups, opium, cotton goods, woollens, metals, and sundries, we find with regard to opium a decrease in the total import of 18 cwts., a decrease shared in by both the kinds (to all intents there are only two kinds), Benares and Persian, which are consumed here.

The consumption of the Persian drug, it will be noticed, is now about 11 times as great as that of Indian. 10 years ago less Persian was taken than Indian, the ratio being then as 5 to 7. 10 years before that again, in 1873, the import of Indian opium was 11 times as great as the Persian total, the two classes having thus, by a curious coincidence, exactly changed places in the 20 years.

Formosa is therefore, for the above holds good in the main of the south of the island also, a lost field for the Indian poppy; the comparatively trifling demand for Benares opium that still exists being accounted for by the preference for that description that marks the Cantonese colony, here as elsewhere, and by the luxurious taste of the rich landed proprietors. Apart from these persons, were the supply of Indian opium absolutely cut off to-morrow, the market here would remain unaffected. No one would have to give up smoking nor to alter his tastes or habits. Formosa in fact would remain calm. No doubt, it may be said, Formosa is but one, and that the smallest, of all the Chinese

provinces. That is true. But what is there to prevent the example of this province being followed by others, given the alternative, I purposely leave Chinese grown drug out of consideration, between Persian opium and total abstention? I have dwelt on this point because the fact "that producing countries not under the British flag are not only ready to supply the field in the future, but have made considerable advance in their supplies in the past,"* seems generally to be ignored or little known, no reference to it, for example, being contained in the list of questions recently circulated by order of the Royal Commission on Opium.

There is but little change to note in this group. Taking, for purposes of comparison, the hundredweight, which is the classifier of cotton yarn, as equivalent to the "piece" for the other descriptions, the total of the cotton goods shown on Table 2 was 168,842 for 1893 against 158,119 in 1892. But of this increase of 10,723 pieces, only about 3,300 are to the credit of white shirtings, and 1,600 of grey. There is a decrease of 800 pieces in the very small supply of T-cloths, a proportionately marked falling-off in unclassified cottons, 10,900 pieces against 16,400, while 9 cwts. less cotton yarn arrived than in the year before. It is Japanese cotton cloth that has redressed the balance. The figures of this fabric stand at 74,520 for 1893 against 62,444 for 1892, an advance of over 12,000 pieces. Indeed the total seems nearly to equal that of grey and white shirtings together, but the fact is not really so, because the "piece" of the Japanese cloth has only about one-third of the contents of the "piece" of shirtings.

Nevertheless, when it is remembered that in 1891 the import of the eastern-made cloth was 34,000 pieces, and in 1882 no more than 540 pieces, it is easy to appreciate what is taking place. In this market, at all events, Japanese cloth has come into severe competition with shirtings, and handicapped as the latter are now by the crushing weight of exchange, is, I much fear, gaining the day. Thus the average number of pieces of grey and white shirtings, taken together, imported into Tamsui during the decade 1884-93 was, in round numbers, 90,000; last year it was 80,000. The average of grey shirtings alone was 43,000; last year it was 38,000. The average of white shirtings for the same period was 48,000; last year 42,000. Again, 20 years ago the quantity of grey shirtings arriving was practically the same as now, though the import of white shirtings was only one-fourth of the present demand. It seems, in fact, as though the limit of consumption in this direction had been reached already in North Formosa, and that beyond the small increments occasioned by the natural growth of the population, there was in any case not much expansion of this branch of trade to be looked for. But in addition to the crippling effects of the present exchange, which, of course, acts directly in favour of the Japanese manufacturer, the article produced by the latter appears to have hit the popular

* Mr. H. B. Morse, Decennial Report on Tamsui, 1882-91, p. 15. (1759)

taste, being especially suited for underclothing. It is cheap. Thus a piece 12 yards long by 2 feet wide is sold here retail for about 1 dol. 50 c., say 3s. This will suffice to make a man of average size three jackets. It is "warm," by which is meant that it absorbs perspiration freely, and does not, like foreign shirtings when soaked in this way, offer a chill and clammy surface to the body of the wearer. It is in various patterns, with stripes or other decorative attractions, for all sorts of tastes. It is of a texture that makes frequent washing less necessary, the need of it less obvious, and the process less troublesome and lengthy than is the case with shirtings. In short, it is a success, and "everybody wears it." Still, I am glad to say, there is a demand for a higher class of fabric which, so far, Japan has not met, and England and America may still retain, unless China herself can wrest the market from them.

The Japanese cloth is not adapted for receiving the blue and black dyes ordained by custom, the former for the outer coats of both sexes, and the latter for the trousers of women. Nor will custom sanction as yet the use of other than shirtings for certain garments used in the grave clothes of the dead.

Woollens.

It will be seen that the import of this class of textiles is very small and almost stationary, such movement as there is being backwards. But no large demand for woollens could ever be looked for in Formosa, with its tropical or semi-tropical climate.

Metals.

The total of this group, stated in hundredweights, was last year 22,306, against 22,461 in 1892, showing a small decrease of 155 cwts.

Manufactured iron.

The item of manufactured iron is insignificant, 2,785 cwts. only, and has dropped from 4,000 cwts. in 1892.

Lead and tin.

The demand for lead and for tin is governed by the season's crop of tea, the former being required for the lining of the tea boxes, and the tin for soldering them down.

Present import of metals insignificant.

Some day perhaps the import of metals may be less trifling than it is now, but at present there is something almost pathetic on being asked by manufacturers at home to supply them with the names of importers of machinery "such as ours."

One item not shown on Table 2 was a consignment of railway locomotives mentioned in another part of this report.

Sundries.

Sundries.

Of the six items under this heading, four are of foreign origin, and again it is Japan which claims the only one that shows an increase. The import of Japanese matches rose from 136,450 gross in 1892 to 140,900 gross last year. Llama braid shows a small decrease, and kerosene oil, both American and Russian, a very heavy one of over 134,000 gallons for the former, and but little less than 400,000 gallons for the Russian kind.

Popularity and cheapness of Japanese

Another instance of successful Japanese enterprise is seen in umbrellas. The returns in the customs tables under this head, if

I am not misinformed, do not represent by a long way the quantities actually arriving. The favourite kind here is a light ^{made} umbrellas, one with an ornamental handle and alpaca covering, a very ^{alpaca, and} serviceable and by no means "Gampish" article, sold in Tamsui ^{silk.} retail for 75 c., say, at present rates, 1s. 6d. And silk umbrellas, really well made, for 2 dol. 25 c., say 4s. 6d. I need not remark that they are immensely popular.

Rice.

This staple concerns foreigners only in so far as it becomes ^{Rice.} steamer cargo. Last year it will be seen there was a large import ^{Imports.} of 304,000 cwts. It has often been pointed out, for instance, by Mr. Hosie in his "Report on the Island of Formosa" (1893), page 10, that the supply of rice now is "little more than sufficient to meet home requirements, except when the harvests prove exceptionally bounteous." This they did not do last year. On the contrary, an average fruit crop was succeeded by a drought-strangled autumn harvest, necessitating supplies from the mainland.

Exports.

The trade in this product is rapidly growing in importance. ^{Exports.} The export in 1893 was much the largest on record, and more ^{Camphor.} than double that of the previous year, amounting to 32,134 cwts., against 15,440 cwts. for 1892, which total, however, in consequence of disturbances on the border, was smaller than in 1891. To all appearance this branch of business is destined to increase still more in the near future, especially if certain difficulties which somewhat detract from the market value of Formosan camphor as compared with the Japanese product can be overcome. As conducted in North Formosa the business requires the command of considerable capital on the part of the exporter, whether foreign or Chinese, and is attended with a good deal of pecuniary risk. Heavy advances have to be made to enable the stoves to be built and current expenses to be paid. No advance, no camphor, is the rule. Unfortunately, however, there may be plenty of advances without any returns, either in cash or camphor, if the savages should elect to "come out of the grass," as it is locally termed, and raid the spot with fire and spear, leaving the stoves a heap of ashes with a fringe of Chinese corpses.

The export of this commodity shows an increase of 7,245 tons, ^{Coal} the figures being 21,748 tons in 1893, against 14,503 tons in 1892. During the year under review the supply has been altogether from the private pits, the Government mine remaining idle, and the machinery, still in situ, being rusted and ruined, owing to neglect and to the water standing in the disused workings. The seams in the immediate neighbourhood of the Government mine have been—at least, nominally—forbidden ground for private

enterprise. Formosan coal is splendid house-coal. It is also good, if smoky, steam coal, though not equal to Japanese. But as to that, it must be borne in mind that none but surface coal is available here, whereas that produced in Japan is mined from deep seams, and were mines of the same character allowed in Formosa the quality of the output would doubtless improve.

Sulphur.

Sulphur was exported in 1893 to the amount of 5,747 cwts., against 3,357 in the previous year. Commercially speaking, it is of little interest to foreigners, as it is the subject of a Government monopoly.

Gold

One article that does not appear in Table 3 is gold, as, for obvious reasons, very little is declared at the foreign customs. Gold-washing, however, has been regularly carried on throughout the year. What the yield may have been it is impossible to ascertain or even to guess, since nobody, Chinese or foreigner, knows.

The Government has farmed out the collection of license fees, and does not concern itself further in the matter.

But a change is said to be impending, and the trade report for 1894 may have more to say on the production of the precious metal than has been the case hitherto.

Tea.

The export of tea was in 1893 the largest on record, reaching a total of 21,859,867 lbs., against 18,228,933 lbs. for the previous year. To show the growth of production of this staple in North Formosa I may mention that last year's figures are almost double those of 1878, and six times those of 1874.

The custom returns have hitherto classified all tea exported hence as Oolong, but this year a second description has been distinguished under the name of Pouchong.

Export of
Oolong tea,
and of
Pouchong
(a scented
tea).
Notes on the
tea season of
1893.

In round numbers, 20,000,000 lbs. of Oolong tea left the port, and 1,800,000 lbs. of Pouchong. The latter is a scented tea specially made up for Chinese consumption in the Straits Settlements, Java, and Sumatra.

I am indebted for the substance of the following notes on the season of 1893 to Mr. A. F. Gardiner, of Messrs. Boyd and Company.

The season opened early, and buying became general towards the end of April, ceasing late in November.

Prices at first were higher than in the previous season, but the state of exchange being considered, not remarkable. In a few days after the opening, however, the market advanced rapidly and continued very high up to the beginning of August. A slight drop took place at the end of that month, but towards the end of September, owing to large settlements in Amoy, prices again rose till the previous rates were reached, so that high prices may be said to have prevailed all through.

Largeness of
crop.

The quantity was in excess of any previous year, attaining a total of 465,597 half chests. This was due to a very large spring crop, for the summer crop was a very small one and the autumn pickings not out of the way. New plantations, high prices, and a cause which furnishes subject for much complaint, the im-

Reasons.

portation of inferior teas from Wenchow and Amoy which are mixed with the true Formosa Oolong to the great detriment of its character, and thus put on the Twa-tu-tia market, account for the size of the 1893 crop.

The quality of the 1893 teas, taken all round, was poor. The spring crop came on so suddenly that the Chinese in the country were taken quite unawares, and nearly all the teas were brought to market without having been properly prepared. They were chiefly middle and lower grades of poor character.

The summer crop was the best of the season.

The earlier autumn crop was good in leaf but very poor in cup. However, they were liked in America.

The late autumn teas comprised some of the worst ever on offer in this market. It was in this crop that the inferior teas from the mainland were mixed, including some that had been damaged in a typhoon and were brought over here and re-fired.

As to the financial results of the season the growers in the country are said to have made money, and the native "packers" or tea buyers to have lost as much, it is reported, as 150,000 dol.

I learn also that the tea lekin farmer who paid for his privilege in 1893, 350,000 dol., has had to increase this sum by 25,000 dol. for the coming year.

Quality of
1893 teas
poor.

Results of tea
season to
growers.
To Chinese
buyers.
To tea lekin
farmer.

Shipping.

Table 1 shows a larger total of vessels entering and clearing from Tamsui and Kelung, but there is but little real change to report.

The port has regular steam communication with Hong-Kong via the mainland ports of Amoy and Swatow by the line of steamers of Messrs. Douglas Lapraik and Company, of Hong-Kong. Between here and Amoy there runs also one of the two steamers belonging to the "Formosa Trading Company," the other maintaining a somewhat erratic connection with Shanghai.

These two vessels, the "Smith" and the "Cass," really form part of the assets of the provincial Government, and the expenses of keeping them in repair, payment of officers and crew, &c., would have to run on whether they were earning money or lying idle.

Accordingly they "earn whate'er they can" in the way of freight and passage, but it is clear that they are not managed on very relentlessly economical principles, or they would not so frequently be detached to convey mysterious coffins or to await vaguely expected official families.

Regular
steam com-
munication
with Hong-
Kong.
With
Shanghai.

Nature of
conditions
under which
vessels of
"Formosa
Trading
Company"
run.

General Remarks.

Mr. Hosie, in his recent "Report on the Island of Formosa," pointed out that "under the present Governor retrenchment and economy are the order of the day." This is the precise truth, but

Present
Provincial
Government
cautious and
economical.

Not
reactionary.

what is not so, though I think it is sometimes believed, is that the present administrative condition is one of total stagnation or even of reaction. The following notes will show that matters are not so bad as that, marked though the contrast is between the present régime and that under the late Governor Liu.

Railways.

Railways.

There are two lines of railway in Formosa, both having their termini in the present capital, Tai-peh-fu (of which Twa-tu-tia is practically a suburb), the northern and the southern branches.

Northern
line.

At the beginning of 1893, the northern branch, that between Twa-tu-tia and Kelung, was working regularly between those places, a distance of $19\frac{1}{4}$ miles, with a daily service of two trains each way, though interrupted at a spot called Patu, by a gap due to the loss of a previously existing wooden bridge during a heavy freshet, on September 6, 1892. In the course of 1893 this has been replaced by a new steel bridge supported on stone abutments, which was opened to traffic on October 29 last.

Southern
line.

At the commencement of 1893 this ran as far as a temporary station called Yang Shih Wu, $33\frac{1}{4}$ miles from the Twa-tu-tia terminus. On June 5, an extension to Fêng Shan Chi, $39\frac{1}{4}$ miles, and on June 19, a further extension to the district city of Hsin Chu (locally called Teck Cham), $43\frac{1}{2}$ miles, were opened. The latter remains the terminus southwards for the present. No serious interruption of traffic has occurred, and since the re-engagement of Mr. J. Fenwick, as locomotive foreman, and the increase in the number of engines, the previous petty interruptions and delays have much diminished.

Bridging
work.

Between Fêng Shan Chi and Hsin Chu, a good deal of bridge-work has been done, and almost entirely by the Chinese alone, under a Cantonese known as "Chang, the bridge builder," who undoubtedly must be, in his way, a competent man.

The first bridge is immediately south of Fêng Shan Chi. It consists of 1 span of 200 feet, 3 spans of 50 feet, 1 span of 120 feet, all of steel, and 6 spans of 30 feet each, of wood.

Less than 1 mile further, at T'o Tzü P'u, is the next bridge, consisting of a number of wooden spans, and one 50 feet, and one 200 feet steel spans.

After another mile or so comes the Hung Mao Tien Bridge, of several small timber spans, with one steel span of 50 feet, and a second of 150 feet.

Some of the timber work of the above bridges was done in 1892, but all the steel spans were erected last year.

And here the southern line stops short, the authorities being probably hindered from continuing by the knowledge of the serious difficulty and expense confronting them in the bridging of the Tyka River.

Difficult river
to bridge in
next section.

During 1893, three new engines, four passenger coaches, and six wagons, were received from Birmingham, and a telephone system was installed on the northern branch.

Arrival of
new rolling
stock in 1893.

In the course of the summer the superintendent doubled the rates charged, with the result that the traffic fell off. There seems to have been a partial recovery since, but no information, even of the most general kind, as to the makings of the lines is obtainable.

A small slip for repairing Government steam launches has been constructed at Twa-tu-tia, which it is intended to enlarge, and one launch has had repairs effected there.

Repairing
slip for
Government
launches.

General Remarks.

During the year the Government has turned out a considerable amount of subsidiary silver coinage. This, however, has been done without any minting machinery properly so-called, but the coins have been struck by cartridge-making machines, slightly altered, which answer fairly well, though only 5-cent. and 10-cent. pieces can be issued, as the press is not strong enough to coin the heavier 20-cent. pieces. The intrinsic value of these coins is, I believe, not so great as those minted in Canton, but the telegraph offices and the railway ticket offices receive both kinds at par, which they refuse to do in the case of Hong-Kong, Japanese, or other similar currency.

Minting of
subsidiary
silver coins.

Another mark of progress has been the partial completion and opening of a powder factory at Twa-tu-tia. It is not as yet working to its full extent, as some of the machinery made in the arsenal is still unfinished. Judging from the past, the manufacture and preparation of warlike stores seems likely to act as a permanent check on the population of North Formosa, owing to the incurable carelessness of the workmen. Since I arrived in November last there have been three explosions due to the heedless handling of powder or loaded projectiles.

Opening of
powder
factory.

Explosions
due to
carelessness
of workmen.

The first was an experiment in military mining. This experiment cost the life of the man holding the danger-signal flag who was instantly killed.

The second explosion took place in January last at the arsenal, when two men were killed and six others wounded.

The last and severest explosion has occurred while I have been writing this report. Three day ago I felt a dull shock which made the house vibrate, and learnt later that it had been the effect of the blowing up of a part of the factory, 10 miles distant, in which powder was actually being made. Seven men, all that were at work, were instantly killed. I doubt, however, if other workmen will be rendered more careful in future in spite of this disaster.

In concluding the present report I desire to express my thanks to Mr. H. B. Morse, commissioner of customs, for his courtesy in affording me access to the customs returns, as well as to Mr. H. C. Matheson, consulting engineer to the Formosan railways, for valuable notes.

Conclusions.

Annex 1.—RETURN of all Shipping at the Ports of Tamsui and Kelung during the Year 1893.

ENTERED.

Nationality.	Steam.		Sailing.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	91	57,380	3	996	94	58,376
Chinese	74	46,633	...	...	74	46,633
German	23	9,876	5	1,506	28	11,382
Spanish	...	...	2	134	2	134
Norwegian	...	...	1	193	1	193
Total	188	113,889	11	2,829	199	116,718
„ for the year preceding ...	134	80,483	9	2,836	143	83,319

CLEARED.

Nationality.	Steam.		Sailing.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	91	57,380	4	1,328	95	58,708
Chinese	74	46,633	...	...	74	46,633
German	23	9,876	5	1,506	28	11,382
Spanish	...	...	2	134	2	134
Norwegian	...	...	1	193	1	193
Total	188	113,889	12	3,161	200	117,050
„ for the year preceding ...	134	80,483	9	2,791	143	83,274

Annex 2.—RETURN of Principal Articles of Import into Tamsui and Kelung during the Years 1892-93.

Articles.		1892.		1893.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Opium—					
Indian, Benares ...	Cwts. ...	200½	15,272	200	14,317
Persian ...	" ...	2,296½	158,631	2,287	169,000
Cotton goods—					
Shirtings—					
Grey ...	Pieces ...	36,396	14,977	38,487	14,928
White ...	" ...	38,616	19,449	41,969	20,106
T-cloths ...	" ...	3,199	849	2,400	572
Japanese cotton cloths	" ...	62,444	3,477	74,620	5,202
Cotton, unclassified	" ...	18,382	...	10,898	4,396
Cotton yarn ...	Cwts. ...	693	2,180	682	1,961
Woolens—					
Camlets, English ...	Pieces ...	2,678	4,769	2,568	4,223
Lastings ...	" ...	1,258	1,747	1,118	1,518
Long ells ...	" ...	1,560	1,612	1,572	1,483
Yarn and thread ...	Cwts. ...	184½	2,215	163½	1,786
Metals—					
Manufactured iron ...	" ...	4,039½	2,025	2,784½	1,328
Copper ...	" ...	2½	...	71½	196
Tin ...	" ...	172½	820	184½	871
Lead ...	" ...	18,246½	14,527	19,265½	11,372
Sundries—					
Beans ...	" ...	37,958½	12,306	39,993	11,080
Llama braid ...	Packages ...	16,685	1,125	9,573	604
Flour ...	Cwts. ...	11,982	6,913	17,831	8,543
Matches, Japanese ...	Gross ...	136,450	5,685	142,900	5,466
Kerosene oil—					
American ...	Gallons ...	568,080	12,459	433,710	8,013
Russian ...	" ...	837,970	18,198	439,190	8,998
Rice ...	Cwts. ...	33,464½	7,509	304,133	84,439

Annex 3.—RETURN of Principal Articles of Export from Tamsui and Kelung during the Years 1892-93.

Articles.		1892.		1893.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Camphor ...	Cwts. ...	15,440½	49,449	32,134	116,836
Coal ...	Tons ...	14,503	8,338	23,748	12,104
Rattans ...	Cwts. ...	792	385	967	346
Rice ...	" ...	39,327	9,188	...	...
Sulphur ...	" ...	3,357	1,616	5,749	1,391
Tea—					
Oolong ...	Lbs. ...	18,228,933	634,773	20,047,200	730,590
Pouchong ...	" ...			1,812,667	62,727

Annex 4.—TABLE showing Total Value of all Articles Exported from and Imported to Tamsui and Kelung from and to Foreign Countries and Chinese Ports during the Years 1892-93.

Country.	Imports.		Exports.	
	1892.	1893.	1892.	1893.
	£	£	£	£
Great Britain	1,200	3,819	..	..
Hong-Kong	323,512	346,322	74,941	120,306
Straits Settlements ..	..	561	..	..
United States of America	3,351	1,694	..	..
Continent of Europe	..	..	..	..
and Russia	4,019	..	..	..
Japan	375	287	..	59
Cochin-China, Tonkin,	..	..	..	..
and Annam	..	7,634	..	..
Java	..	426	..	..
Chinese ports	180,771	249,371	667,691	812,728
Total	513,228	610,114	742,632	933,093

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AND FINANCE.

CHINA.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF CHUNGKING.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1230.

*Presented to both Houses of Parliament by Command of Her Majesty,
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1321. Rio de Janeiro	3d.	1381. New York	2d.
1322. Réunion	3½d.	1382. Zanzibar	2d.
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CHINA.

CHUNGKING.

Acting Consul Fraser to the Earl of Kimberley.

My Lord, *Chungking, March 7, 1894.*
I HAVE the honour to forward herewith my Report on the
Trade of Chungking during the year 1893.
I have, &c.
(Signed) E. H. FRASER.

Report on the Trade and Commerce of Chungking for the Year 1893.

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(1756) A 2

Value of
trade for
1893.

The value of the trade passing through the imperial maritime customs at Chungking during the year 1893 is returned as follows:—

Description.	Value.	
	Sterling.	Currency.
	£	Haikwan taels.
Foreign imports	914,806	4,574,031
Native "	99,926	499,630
" exports	733,447	3,667,235
Total	1,748,179	8,740,896

Foreign
imports.

As compared with 1892, foreign imports declined 1,251,443 Haikwan taels, this amount being made up of decrease in cottons, 1,176,480 Haikwan taels; in woollens, 96,931 Haikwan taels; in metals, 10,190 Haikwan taels; while foreign sundries and native imports increased by 32,158 Haikwan taels and 100,484 Haikwan taels respectively, and exports by 646,118 Haikwan taels.

Native
imports and
exports.

At first sight the above figures seem to show the effect of the depreciation of silver, and of the action of the Indian Government (especially as Indian yarn accounts for no less than 935,497 Haikwan taels of the decrease in cottons), in checking imports and encouraging exports. But there are some good reasons for doubting whether these circumstances afford more than a partial explanation of the course of trade. In the first place, rather more than 350,000 Haikwan taels of the increased export are due to enhanced valuations; and the remaining 290,000 Haikwan taels constitute an advance of only $9\frac{1}{2}$ per cent. on 1892—no extraordinary advance in a port lately provided with new facilities for exportation. Further, it is always to be borne in mind that the total foreign imports can supply the wants of but a small fraction even of the population of this province. As a matter of fact, our piece-goods are chiefly used by the dwellers in a few cities, *e.g.*, Chungking, Lu Chou, Sui Fu, Chiating, and are bought almost exclusively by the middle classes, to whom an advance in price is not a serious obstacle, while the vast country population continue to wear the native woven cloth on account of its superior warmth and durability. It is not to be denied that Indian yarn is also used by country weavers to mix with native yarn; but the dealers who acted on the fear that the sudden rise in price would check consumption, and so stopped shipments in the middle of the year, found, to their surprise, that in a very short time the demand for yarn, even at an advance in price approaching 20 per cent., was as brisk as ever. An examination of the import figures for the

NOTE.—Throughout this report the Haikwan tael is reckoned as equivalent to 4s. 4d. in 1892 and to 4s. in 1893; the Chungking tael as equivalent to 3s. 9d.; the picul as equal to 133½ lbs.; and the tael weight as equal to 1½ oz.

last 10 years supports the opinion of merchants that the lessened import of 1893 was merely due to overstocking in 1892.

If the above surmise be correct, it entails the disappointing conclusion that the demand for foreign textiles is not extending in the west. And there is good reason to believe that foreign textiles must always be a luxury reserved for the comparatively well-to-do in provinces approached only by a tedious voyage of 1 or 2 months from Ichang, followed either by equally slow junk carriage, or by land carriage over roads unfitted for the rudest wheeled traffic, even if one leaves out of account the harassing burden of lekin and sometimes octroi. Nor does there seem to be any prospect of easier conveyance. Railways to the south-western frontier of China would, owing to the nature of the country, have little effect, except in their immediate neighbourhood, while the country between Chungking and Ichang forbids any attempt at railway connection between Hupei and Szechuen. Even were steamers to be placed on the Upper Yangtse, the dangers of the route and the cost of special vessels would necessitate such high freights, at any rate for many years, that bulky goods could not be shipped by them.

Consumption
of foreign
goods.

Navigation.

The trade during 1893 was carried on as heretofore, in chartered junks only. Their size varied from a vessel of some 57 tons burden to a mere skiff of 2 tons. The average tonnage of upward junks was about 27, of downward between 16 and 17 tons—a difference explained, generally, by the bulky character of imports, and the valuable nature of such exports as opium, musk, silk, and whitewax, which are forwarded in small lots so as to distribute the risk of loss.

Trade in
chartered
junks.

The decrease in upward traffic fell upon the one American and the three British firms engaged in the business, while the number of junks chartered by the branch of the China Merchants' Steam Navigation Company established in 1892 almost doubled.

Decrease in
number of
foreign
chartered
upward junks.

Nearly two-thirds of the downward junks were under the British flag, the remainder being Chinese-chartered.

Shares of
downward
shipping.
Freight.

Freight remains much the same, being kept down by competition and the low price of rice; and there is probably very little profit to be made out of the shipping business.

Foreign charterers continue to complain of petty exactions on the part of the native customs officers at a few points. It is, however, quite possible that the masters of junks really incur these payments by smuggling small quantities of dutiable goods.

Complaints of
extortion.

A more serious complaint was preferred by a British firm in September, namely, that a chartered junk, which, having run on a reef, had been got to the bank by her own crew, was forced to pay a large sum as salvage by a lifeboat and some local boatmen, who took possession of the mast and sail as security. Reference to the local authorities brought an explanation that the vessel

had really been salved and that the only extortion was by the head of a coolie gang engaged in laying out her cargo of drugs to dry in the sun.

Complaints
against
chartered
junks
inevitable.

Soon after the Superintendent of Trade forwarded complaints from some of the local authorities along the Yangtse that the masters of chartered junks presumed on their status to bully other vessels and to refuse the usual rewards for aid rendered to their junks when in danger.

Such complaints from both sides seem to be inevitable under the circumstances. Foreign firms can hardly send a supercargo on each junk, even if the junk people were sure to listen to him; and however careful they may be in impressing on the masters of chartered vessels the need for circumspection, they cannot guarantee that their orders will be carried out. Moreover, whenever a dispute arises, the reports sent to the authorities of the nations concerned are sure to be widely divergent and the exact facts unascertainable.

On the whole, the new system works with wonderfully little friction, considering the natural inclination of native runners to "squeeze," and the equally natural inclination of Yangtse boatmen to make the most of the fact that they are employed by foreigners.

A secret society outbreak near the provincial capital, which showed the rebels to be armed with foreign guns, doubtless excited a suspicion that arms and ammunition might be smuggled into this province in chartered vessels.

New customs
station.

In the middle of December the extra station, some ten miles below Chungking, provided for in the customs regulations of the port, was established and an officer stationed there to examine every chartered vessel that passes up or down. Owing to the nature of the voyage, the hatches of chartered junks cannot be sealed, and on arrival their cargo is usually sent in cargo-boats from their anchorage to the customs pontoon, so that no actual examination of each vessel has hitherto taken place.

Present
customs
arrangements.

The custom-house remains inside the walls, with the examination station on the opposite side of the Yangtse. The present arrangement may be somewhat inconvenient, but the authorities are naturally loth to alter it until longer experience has shown what final disposition would be of most permanent benefit to the trade of the port, which, as stated in last report, seems especially to call for the employment of steam launches to tow cargo-boats to and from the numerous anchorages used at various stages of the river, and to take shippers between the pontoon and the gates nearest their places of business. The question is complicated by the possibility of steamers one day running to Chungking, the reluctance of native merchants to alter business arrangements that have obtained for generations, and the danger that to move out of the city would lead to the imposition of a heavy lekin on all goods entering the gates.

Insurance.

The insurance business inaugurated by the Chungking Transport Company has been taken advantage of to a considerable

extent by the smaller dealers whose whole capital is often ventured in one cargo, and to whom the presence of the company has doubtless proved a great boon. The old-established wealthy shipping firms have mostly held aloof, preferring to divide up their ventures and to run the risk themselves rather than to pay the high premia necessarily demanded. Nor have these high rates been remunerative to the company insuring, for it is currently reported that the losses exceed the premia collected. The fact appears to be that the succession of small freshets and subsequent falls in the water-level during the flood season of 1893 (June to August), proved far more fatal to junk traffic than the great flood of July, 1892.

Roughly speaking, it is estimated that one junk in ten arrived with her cargo more or less damaged by water, while several were broken up altogether. Total loss is, however, rare, as injured junks are usually manœuvred into some quiet bay below the danger, even if they reach the shore in a sinking condition. The cargo is then landed and dried, while the junk is repaired. When the repairs are completed, the cargo is brought on in the original packages, and as the manifest remains intact, only the consignees or the insurers know of the accident.

Estimated
number of
wrecks.

Trade and Commerce.

Cotton goods, which represent over 70 per cent. of the total foreign imports, also account for more than 94 per cent. of the total decrease. There is hardly an item that does not show a heavy falling-off, the exceptions being such small imports as T-cloths, handkerchiefs, and towels.

Imports.
Cotton goods.
Heavy
decline.

Nevertheless, importers profess to have had a satisfactory year, and I have heard of only one or two unimportant failures.

Business fair.

With the exception of grey shirtings and Indian yarn the normal quantities imported are so trifling, as compared with the millions inhabiting this province alone, that it seems needless to seek for any other explanation of the decrease than over-stocking in 1892. As stated in the 1891 report, the change of system under the Additional Article of the Chefoo Convention excited doubt and apprehension in Chungking and checked business. When last year the new system was found to work smoothly there was naturally an inclination to import too freely.

Shirtings, like other piece-goods, are used almost entirely in the large cities, chiefly for coat-linings and for summer wear. The country people complain that they do not give so much protection from the weather as native cloth, and that they will not stand their primitive style of washing, which includes placing the wet garment on a stone and thumping it with a club. The rise in wholesale prices is about 15 per cent., and in retail prices somewhat more: but that is not enough seriously to curtail the demand. Stocks are reported low, so that there is a prospect of an increased import in 1894.

Shirtings.

Rise in prices.

Stocks.

Yarn,
English.

English yarn has almost disappeared from the market. Its only use seems to be for making thread.

Yarn,
Indian.

The sudden rise in Shanghai prices in the middle of the year, owing to the action of the Indian Government, frightened many regular dealers in Indian yarn, and orders almost ceased to be sent, some declaring that the laying-down cost was 10 per cent. above the selling price up-country. Native weavers had, however, learned to appreciate the value of Indian yarn as a warp in making cloth from native yarn; and, after a short lull, the demand grew brisk and stocks were rapidly cleared off. At the close of the year, during which the average price per bale had risen from 63 or 64 taels (12*l.*) to 76 taels (14*l.*), or even more, large orders were sent to Shanghai, and the figures for the spring months will probably show a marked recovery.

Mixed yarn
cloth.

It is to be noted that pure native cloth is still preferred up-country to cloth woven from native and Indian yarn together, and that the present price of Indian yarn is within measurable distance of making mixed yarn cloth as dear to produce as the pure native cloth.

Chinese piece-
goods and
yarn.

135 pieces of Chinese grey shirtings appear for the first time in the customs table. Chinese drills and sheetings have, however, dwindled from 60 and 966 pieces to 15 and 20 pieces respectively, and Chinese yarn has advanced only from 40,000 lbs. to 56,400 lbs. Of these articles the sheetings and 45 pieces of the drills were produced by the Shanghai cotton mill; but competition from that quarter was interrupted by the destruction of the mill and much of the stock by fire on October 19, 1893. The mill will, doubtless, be rebuilt, probably with improved machinery; but its products are never likely to reach Chungking in any quantity now that a more serious competitor has arisen in Wuchang. Though the out-turn there is as yet too small to meet the eager demand of Chinese dealers in Hankow, 2,490 pieces of shirtings and 852,800 lbs. of yarn were shipped for Szechuen in the latter part of 1893 under special passes, which are granted on payment of the import duty at Hankow and clear the goods from all other charges whatever throughout the Empire. This means that Wuchang yarn is given an advantage over the imported article of a half-duty, if transit-passes were respected, or else of the amount of lekin payable at stations beyond Chungking. And in Chungking similar passes may be obtained for the lots, however small, into which Wuchang yarn shipments may be divided in the city.

Qualities of
Wuchang
products.

The Wuchang shirtings are reported to be too loosely woven, and the yarn is objected to as very rough and uneven. The yarn is put up in bales slightly smaller and lighter than Indian bales, and its price averages at present 6 taels (say 1*l.* 2*s.* 6*d.*) less, with a very slack demand.

Scheme for a
mill at
Chungking.

Indian yarn is, moreover, threatened with a new competitor. The superintendent of trade here has sent deputies to enquire at Wuchang and Shanghai as to the feasibility of establishing a cotton mill in the neighbourhood of Chungking; and it is said

that their reports are favourable to the scheme. The capital is to be subscribed by officials and merchants, a considerable amount of support being already promised by Hankow native traders. Apart from the initial difficulty of transporting bulky machinery to Chungking in the native junks that ply on the Upper Yangtse, cut up as their holds are into many compartments, the supply of raw cotton for the new mill would be a serious question. Chêkiang cotton is admittedly the most suitable, but there is already a keen demand for it in Japan and in Wuchang, where it is used in equal proportions with the local cotton. Hupei cotton will make certain grades of yarn, but the freight on its loosely-packed bales would be not much short of that on Chêkiang cotton. Under these circumstances Szechuen cotton will naturally be enquired for. A considerable amount is grown in certain districts 100 miles to 200 miles to the north, and the Chialing River affords facilities for its shipment to Chungking. But it is doubtful whether much can be produced in excess of the present local requirements, and so possibly an attempt might be made to substitute cotton for opium-growing at least in this neighbourhood. My enquiries tend to prove that cotton-growing was never a success in this part of Szechuen; and the increasing demand at higher prices for the drug down river, together with the great profit obtainable from the opium crop in good years, makes the success of such an attempt far from certain. There remains the alternative of confining operations to weaving cloth from Indian yarn. This would greatly simplify matters, and probably be profitable; but such an expedient might be deemed inconsistent with a patriotic desire "to recover a source of profit for China."

Supposing mills in full working at Shanghai, Wuchang, and Chungking itself, would Indian yarn cease to come to the West? I think not. It would take some years at least for Chinese-made yarn to reach a high level of manufacture. Again, Chinese cotton will only make certain grades of yarn, which are, apparently, comparatively few in the case of Hupei cotton. Chinese management has not hitherto proved economical; the advantage of nearness to the market would be partly counterbalanced by the difficulty of getting the raw material adverted to above; and the demand for the Chungking mill would probably raise the price of native yarn. Provided the price of Indian yarn does not rise much higher than at present, therefore, it seems unlikely that it will ever be driven from this market, though the consumption may be seriously reduced.

Woollens, with the exception of a slight increase in long ells and woollen yarn, fell off in 1893, presumably for the same reason as cottons. The total import has never been considerable; nor does there seem to be any prospect of an increase. For the increase in woollen yarn (from 2,647 lbs. to 3,444 lbs.) the curious reason is given that ladies have taken to using this yarn, dyed red, for binding their hair.

Although 553 lbs. of zinc, 11,760 lbs. of lead in pigs, and 6,267 lbs. of copper wire increased the list of metals imported,

Supply of raw cotton.

Prospects of Indian yarn.

Metals.

the serious drop in the import of quicksilver, used in medicine and in making mirrors, reduced the total some 10,000 taels below that of 1892. The most notable increase is in iron wire, which rose from 145,600 lbs. to 213,760 lbs. It comes from Germany in casks and is sent up the Chialing River to be used in making needles and opium-pipe prickers.

Sundries.

The long list of sundries comprises the usual miscellaneous articles, the variations in their amounts being possibly due to changes from the imperial maritime customs to the lekin office and vice versâ. Those from abroad are almost all of German or Japanese origin.

Kerosene oil.

Kerosene oil rose from 20,700 gallons to 55,000 gallons, probably owing to the cessation of transit passes to this city, though there is no reason why passes should not be taken out for places in the immediate neighbourhood and, once K'uei Fu is passed, destroyed, as there is no other customs barrier to be passed east of Chungking. The provincial Government did try to check this practice by placing an officer at Wan Hsien to visé passes; but, as the lekin office did not co-operate with him, junks need only boldly declare that their cargoes had passed the lekin office, to go free. Owing to the inflammable nature of the oil, the guards at the city gates are supposed to see that not more than a few cases enter the city consigned to one shop.

Fires.

The great fire of June 25, 1893, was not caused by the use of kerosene—bad though it is—but by a careless cook. A large number of hongs dealing in imported delicacies, situated on the river bank outside the T'ai'ping Gate, were consumed on this occasion, and the fire, leaping the city wall, burned out a considerable area inside. Some 440 houses are said to have been gutted, and the loss, exclusive of furniture, clothes, &c., is put at over 37,500*l*. Five lives were lost. The officials and gentry subscribed handsomely for the relief of the sufferers, and the houses have been almost all rebuilt. Several other fires have taken place during the year; but none of them was serious. The real difficulty in coping with fires in this city is the delay caused by having to bring water in buckets up the steep steps to the gates. But an ingenious scheme to pump water up to a reservoir outside the north-west corner, the highest point of the walls, and convey it thence in pipes or gutters all round the walls with a tank above each gate, failed to secure the local officials' support for fear lest the water-carriers should lose their means of subsistence, water-carrying being the last resource of broken men.

Matches.

No matches appear in the customs list, but 66,620 gross left Hankow under transit pass for Szechuen. The monopoly company mentioned in last year's report began operations after the Chinese New Year, in February. At the end of March the company interfered with matches sold by a foreign firm to a native dealer. The local authorities strenuously supported the company, and it was only at the end of September that they agreed to let foreign merchants import and sell freely, provided each importation was notified by the consul concerned to the Superintendent

of Trade. This arrangement is likely to be modified so as to acknowledge the right of natives to import foreign matches; and in that case the trade will increase, although the local factories are now turning out an improved sulphur match.

There was a good deal of grumbling when in the middle of ^{Monopolies.} the year foreign matches had disappeared from the shops; but the business is such a small one that no organised resistance was made to the monopoly company. A similar project with regard to cotton yarn, however, excited such sturdy opposition from the dealers that it had hastily to be given up in favour of a suggestion to levy a small lekin on yarn, the proceeds to be devoted to public purposes. But the dealers absolutely declined to give this opening for extra taxation, doubting that the new levy, like the similar tax "for public purposes" on exports, would soon be diverted into the Ch'êngtu Treasury. In response to a final application for subscriptions for police and fire-engines, they offered to subscribe as liberally as other guilds, but demanded that they should retain control of the funds. After this they were left alone, and they have themselves ordered four fire-engines with other appliances from Canton. It is to be hoped that the above experience has put an end to all schemes of restricting trade.

The increase in native imports is due merely to the transfer- ^{Native imports.} ence of business from the lekin office to the imperial maritime ^{Silk piece-} customs, the most notable case being silk piece-goods, which ^{goods.} sprang from 473 lbs. to 11,976 lbs.

The importation of raw cotton through the customs again ^{Raw cotton.} declined; a similar falling-off is reported at the lekin office; and dealers declare that there is a steady annual decrease of 3 per cent. to 4 per cent. The hong in this city lost heavily, and there were several failures. It is stated that shipments direct to cities to the west of Chungking paid, the reason being that all raw cotton entering Chungking has to pay a city lekin of about 1 per cent. and over 1 per cent. more in fees to the close corporation to which the business was handed over by the officials some 40 years ago. The loss of lekin caused by the declining trade in this staple is the reason why such opposition has been shown to the use of transit passes for Indian yarn, as it is of the extra lekin put on yarn, of the attempt to throttle the trade, of the cotton mill scheme referred to above.

The transit pass trade from Ichang increased somewhat in ^{Transit trade.} total value during 1893, though the amounts of cottons and woollens sent into Szechuen were very trifling. The transit-pass goods sent from Hankow show a general decrease, the total shrinkage approaching 250,000 taels (50,000). Indian yarn, especially, fell from 3,036,000 lbs. to 340,400 lbs. Kerosene oil, mostly American, increased from 499,560 gallons to 903,440 gallons. As undoubtedly most of this oil came to Chungking, this would seem to show that the cessation of passes to this city has been met by inserting the names of other places, *e.g.*, Lu Chou and Sui Fu, west of Chungking. The customs examination here

is so rapid that one fails to see why importers should not save the half duty by sending the oil in boats chartered under the Yangtse regulations as far as Ichang and thence under the Additional Article to Chungking. The Chinese explain that most of the shipments are too small to fill a junk, and that a good deal is sold en route, especially at Wan Hsien.

No passes in
1893.

No transit passes were taken out at Chungking during the year. But though the Szechuen Government has not publicly admitted the illegality of the levy of loti shui (destination duty) from Chinese consignees, the lekin exacted on transit-pass goods at Ho Chou in the end of 1891 is to be refunded; and this will perhaps encourage merchants to try inward passes again. A project to make use of outward transit passes for bringing wool down from the north-west of the province fell through owing to the death of the promoter, a German subject. Moreover, merchants assure me that it has been proved by careful enquiry that outward passes would not pay for any export, at least in this province where the lekin offices dare not make unnecessary difficulties and delays lest trade should be diverted to the imperial maritime customs.

Exports.

General
increase.

The principal exports through the imperial maritime customs increased in 1893, though the fall in Shanghai in the tael value of many articles made business, as a rule, unprofitable.

Native opium.

Native opium again furnished a quarter of the imperial maritime customs revenue at this port. Of the total, 335,097 lbs. are returned as Szechuen drug, and only 11,369 lbs. as Yünnan opium. 556 lbs. of dross, valued at 104*l.*, were also exported, against 2,392 lbs., valued at 414*l.*, in 1892.

Crop.

The opium crop in Eastern Szechuen, in 1893, was reckoned at some 70 per cent. of a full return, against 80 per cent. or more in 1892. In the neighbourhood of Chungking the crop hardly exceeded 60 per cent. The winter was exceptionally cold, and heavy showers in April found many capsules already scored for the first time. Crops in Yünnan and Kueichou were late, owing to the severe winter, and in the latter province heavy rain in spring ruined many fields, and raised the retail price in Kueiyang Fu from 3½*d.* per oz. to 4½*d.* per oz.

Business.

The market at Fu Chou, the great exporting centre, opened very late, as it was not till July that prices down river became remunerative; but, as Hankow prices continued to rise, heavy shipments took place in the latter half of the year so that the 1892 total was just exceeded.

Chungking
opium.

In this city, opium grown in the immediate vicinity is coming more and more into favour, while Kueichou opium is dropping out of the market. The export from that province cannot be large, if, as an old resident at Kueiyang Fu informs me, 70 per cent. of the population smoke, as compared with 30 per cent. to

40 per cent. in Szechuen. The local drug is usually pure, though Adulteration. exported opium may contain an admixture of glue, beancurd, and other substances. Fu Chou opium is little adulterated, but Blending. wholesale exporters blend together parcels of varying quality.

The wholesale price for Yunnan opium is at present 7s. 2d. Prices. per lb., an advance of some 14 per cent. during the year, most of the increase being ascribed to the drug drying up with time, and for Szechuen opium 6s. 9d. for old and 4s. 3d. for new per lb. respectively, against 6s. 1d. and 3s. 10d. last spring.

The high prices ruling down river, and the profits made in Prospects. 1893 will probably lead to an early opening of the market and large shipments.

The increase in the export of white silk is ascribed simply to Silk, white more than usual being produced. The Chinese assert that it is not certain that white silk will be spun by worms hatched from and yellow, raw. the eggs of moths that come out of white silk cocoons. Yellow silk did not pay expenses, owing to the comparatively high price (2s. 8½d. per lb.) up country, and a good deal is still unsold in Shanghai. The great disproportion between the amounts of Refuse silk and refuse cocoons. refuse silk and refuse cocoons exported in 1893-92 is due merely to altered classification on the part of the customs. Neither item did more than cover outlay. Szechuen pongees, which rose Szechuen pongees. from 5,172 lbs. to 6,427 lbs., were fairly profitable.

The young mulberry trees sent for by the Superintendent of Encourage-ment of silk production. Trade, as reported last year, were in spring duly distributed gratis to the farmers in proportion to the extent of their holdings. The experiment is not likely to be repeated, owing to the careless way in which the present lot has been attended to.

The export of musk again increased, large supplies coming Musk. from Thibet and Kansuh, which lowered the price from 56s. 3d. to 50s. 7½d. per oz. Skilful buyers made money. It is asserted that 20 per cent. of other substances is invariably added to all musk leaving Chungking, and that this admixture (which is supposed not to injure the scent) furnishes expenses and profits. Deer horns are also dealt in by the half-dozen musk firms of this Deer horns. port.

Medicines, in spite of the greatly-enhanced value at which Medicines. they stand in the list of exports, did not pay, exporters complaining that the prices in the coast ports were nearly the same as in Chungking.

The export of rhubarb, of which a great part is destined for Rhubarb. foreign countries, continues to expand, and, though the increased production somewhat cut down prices, the business proved profitable. The dealers here, mostly Cantonese, trim the pieces square and pack them neatly in boxes. So keen is the demand that shipments from the interior are sold by sample before the junk arrives.

The production is returned at only 60 per cent. of an ordinary Whitewax. year's, owing to wind and rain injuring the insects after they had been placed on the trees. On the year as a whole little profit was made, but in November, on account of stocks being too

small to meet the demand in anticipation of the New Year festivities, prices in Shanghai rose to 472*s.* 6*d.* per cwt., the same amount being obtainable in Chiating for 236*s.* 3*d.* Prices are now 296*s.* 9*d.* in Chiating, and only about 325*s.* at Shanghai. Stocks are said to be small up-country, and, as no doubt local festivities on the occasion of H.M. the Empress Dowager's 60th birthday next November will cause a brisk demand, the business should be profitable in 1894. The palace indent this year was filled at Chiating, instead of at Hankow as usual, and sales to the public were stopped for 2 months. There will probably be a similar interruption in the summer of 1894.

- Bristles. Bristles, which mostly go abroad from Hong-Kong after being sorted at Canton, feathers (3,462 cwts. against 1,810 cwts. in 1892), horns, and leather show a marked improvement, and, as the supply of these articles is enormous, further increase may be looked for.
- Nutgalls. One reason given for the extraordinary rise in nutgalls is that the high price of Yünnan indigo forced dyers to use a greater proportion of nutgalls than usual.
- Safflower. The amount of safflower grown has lessened every year since aniline dyes came into vogue, but this year, at least, the exporters made a small profit.
- Brown sugar. Almost all the brown sugar destined for Hankow and the Lower Yangtse ports now goes through the imperial maritime customs. Exporting pays so well that the local market is straitened, and the retail price has risen from 1 $\frac{3}{4}$ *d.* to 2 $\frac{3}{4}$ *d.* per lb.
- Sheep's wool. Sheep's wool from the north-west of the province did not pay on account of the large admixture of dirt and rubbish with which the bales were weighted; but, could trustworthy agents be settled at Sung-p'an to cleanse the wool there the business might prove remunerative.
- Hemp. Hemp, for native use at Hankow, remains stationary.
- Fungus. Fungus, for shipment to Canton and Chekiang, to be eaten as a delicacy, declined owing to bad weather causing a large proportion to be mildewed and insect-eaten; but, the demand being constant and large, the reduction is probably only temporary.
- Grasscloth. Szechuen grass-cloth, which cannot compete with the finer makes in the eastern provinces, has disappeared from the export list, as it is more convenient to ship it to places west of Hankow through the "lekin" office.
- Tin. The export of Yünnan tin dropped from 69 tons to 13 $\frac{1}{4}$ tons. The reason given is that the heavy Government demand left little for sale. About half of the loan of 20,000*l.* for Kueichou iron mines mentioned in last report has been subscribed, chiefly by local officials, who are more or less compelled to assist.
- Iron mines. The new items, all of trifling amount, were old deer horns, preserves, turmeric, varnish, and salted turnips. The last-named are, on account of the excellence of Szechuen salt, preferred in the central provinces to the locally-salted turnips.
- New exports. Though no gold comes under the cognisance of the imperial.
- Export of gold.

maritime customs, the rapid rise in the value of the metal has led to a large export, chiefly by Cantonese merchants. The price here has in the last 12 months risen 10 per cent., and now stands at 73s. per oz. (26 taels per tael).

I am indebted to Dr. F. Hirth, Commissioner of Customs, for early access to the office copy of his returns.

CHINA.

Annex 1.—RETURN of British and Foreign Chartered Junks Entered and Cleared at the Port of Chungking during the Year 1893.

Nationality.	Entered.			Cleared.			Total.		
	Number of Vessels.	Tons.	Value of Cargo.	Number of Vessels.	Tons.	Value of Cargo.	Number of Vessels.	Tons.	Value of Cargoes.
British	571	15,917	£ 612,689	467	7 162	£ 488,492	1,038	23,079	£ 1,101,181
American	253	7,029	227,750	..	..	..	253	7,029	227,750
Chinese	210	4,976	174,361	260	4,733	244,955	470	9,709	419,316
Total.. ..	1,034	27,922	1,014,800	727	11,895	733,447	1,761	39,817	1,748,247
„ 1892	1,203	33,518	1,348,668	676	9,776	654,574	1,879	43,294	2,003,242

Annex 2.—RETURN of Principal Articles of Import into
 Chungking during the Years 1893-92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Cotton goods—					
Shirtings—					
Grey, plain	Pieces	433,732	225,541	520,983	270,911
White, plain	59	65,987	32,994	84,432	42,075
Dyed, &c.	37	6,561	4,387	19,365	13,803
Cotton prints, plain	31	29,915	10,769	37,775	13,914
Turkey-reds	12	14,677	6,751	28,956	14,430
Lastings	95	22,961	16,073	24,150	15,698
Italians	37	16,498	11,549	15,637	10,164
Cotton yarn—					
English	Lbs.	17,200	671	82,400	3,345
Indian	39	10,343,067	325,807	17,096,667	555,643
Other cottons			23,278		32,987
Woolen goods—					
Camlets, English	Pieces	3,930	8,646	4,940	10,703
Lastings	31	15,731	31,462	21,925	43,704
Long ells	33	7,695	10,004	8,100	10,530
Cloth—					
Russian	39	2,201	11,005	3,121	16,229
Italian	39	5,812	5,660	8,541	9,377
Other woollens			12,831		16,701
Metals—					
Quicksilver	Tons	25	5,961	38	9,650
Other metals	39	128	3,805	91	3,138
Sundries—					
Bêche-de-mer, black	Lbs.	112,884	6,773	156,997	17,859
Buttons, brass	Gross	61,158	6,116	59,590	11,620
Dyes, aniline			15,422		18,436
Ginseng, American clarified	Lbs.	30,200	24,888	22,863	20,434
Isinglass	39	244,701	11,012	292,660	13,316
Seaweed and agar-agar	39	2,076,083	9,342	2,012,925	11,448
Cotton, raw	39	457,488	10,293	553,063	13,481
Curtlefish	39	769,009	17,303	614,529	12,612
Medicines			25,028		19,884
Silk piece-goods	Lbs.	11,976	9,521	473	385
Other articles			126,840		116,183
Total			1,014,732		1,348,668
From Ichang, under transit pass			85,103		80,635
From Hankow, under transit pass			90,087		150,405
Grand total			1,189,922		1,579,708

Annex 3.—RETURN of the Principal Articles of Export
from Chungking during the Years 1893–92.

Articles		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Bristles	Cwts.	6,128	£ 11,069	4,531	£ 8,801
Fungus	"	2,302	5,395	3,944	14,159
Hemp	"	11,636	11,730	11,149	8,522
Horns, cow and buffalo	"	2,012	3,549	1,584	3,028
Leather	"	1,718	4,416	1,401	3,314
Medicines	Value	...	90,370	...	76,346
Musk	Lbs.	4,396	95,638	3,861	90,967
Nutgalls	Cwts.	16,181	21,633	9,713	15,909
Opium, native	Lbs.	346,466	106,188	344,819	89,853
Rhubarb	Cwts.	7,481	18,852	5,503	22,033
Safflower	"	764	5,914	1,158	9,895
Sugar, brown	"	13,542	7,508	4,214	1,802
Wax, white... ..	"	9,133	92,065	9,988	69,079
Wool, sheep's	"	12,819	13,998	12,474	13,622
Silk—					
Raw, white	Lbs.	2,245	606	617	180
" yellow	"	607,976	159,595	645,313	167,781
" wild	"	53,071	5,612	53,163	6,480
Cocoons	"	37,419	2,245	19,736	1,123
" wild	"	21,948	984	16,765	753
Refuse	"	149,075	5,715	1,102,431	35,829
Cocoons, refuse... ..	"	1,310,965	49,251	39,699	1,583
Other exports	...	...	11,215	...	13,517
Total	...	...	733,447	...	654,576

NOTE.—The Haikwan tael is taken as equivalent to 4s. 4d. in 1892, and to 4s. in 1893.

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REPORT FOR THE YEAR 1893

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CHINA.

AMOY.

Mr. C. M. Ford to the Earl of Kimberley.

My Lord, Amoy, April 5, 1894.
 I HAVE the honour to transmit, herewith, my Report on the
 Trade of the Port of Amoy for the year 1893.
 I have, &c.
 (Signed) COLIN M. FORD.

Report on the Trade and Commerce of Amoy for the Year 1893.

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(1778)	A 2

Introductory. It may safely be asserted that no report can well be written on the foreign trade of any of the open treaty ports in China during 1893, that does not draw attention, as the most prominent feature in that trade, to the extent to which it has been disturbed and injuriously affected by the continued and enormous decline in the gold value of silver, which was intensified by the closing of the Indian Mints to silver in the middle of the year. The predictions made by some of the shrewdest business men in the far east as to the results of that action have been fulfilled almost to the letter, and at Amoy the statistics show, in a year when the figures of the total value of the foreign trade are the highest yet recorded, a decrease so great as to be alarming, in that portion of the trade in which Great Britain is most interested, side by side with a very considerable increase in the trade in articles from Asiatic countries where a silver standard prevails.

Value stated
in sterling
misleading.

The fall in exchange between silver and gold which has had to be recorded in so many of the annual reports for recent years having continued, almost without interruption, during the year now under review, it is once more necessary to point out that no fair comparison can be made between the values of the trade, in successive years, of a country where trade is conducted on a silver basis, when these values are converted into their sterling equivalents at different rates of exchange. The only statistics available being those contained in the very complete returns compiled by the Imperial Maritime Customs, in which the values are stated in Haikwan taels, it is only by a comparison of the net values so stated that a just appreciation of the expansion or contraction of the trade can be arrived at. Unfortunately, the standing instructions require that, in reports on trade by H.M. Consuls, all values are to be stated in sterling, with the result that often where the customs returns show an increase, this entirely disappears and even shows a decrease in the consular report, which thus becomes in a manner misleading.

From the customs returns for the year 1893, it appears that there was a very considerable increase in the value of the total trade of the port in vessels of foreign type, the figures being the highest hitherto obtained since the year 1869.

Gross and net
values of
trade.

The following tables show the gross and net values of the trade both in Haikwan taels and in sterling:—

TABLE showing Gross Value of the Trade in Currency and Sterling during the Years 1889-93.

Year.	Rate of Exchange.			Imports.		Exports.		Total.	
	Tael.	s.	d.	Currency.	Sterling.	Currency.	Sterling.	Currency.	Sterling.
1889	..	..	..	Haikwan taels.	£	Haikwan taels.	£	Haikwan taels.	£
1890	..	..	..	12,705,262	2,991,030	2,514,037	591,846	15,219,299	3,582,976
1891	..	..	..	12,030,846	3,107,969	2,223,603	575,981	14,260,449	3,688,950
1892	..	..	..	12,122,667	2,904,389	2,336,539	559,796	14,459,203	3,464,185
1893	..	..	..	12,428,302	2,653,960	2,238,545	478,023	14,666,847	3,131,983
	..	..	..	15,448,370	3,025,306	2,307,669	451,918	17,756,039	3,477,224

TABLE showing the Net Value of the Trade in Currency and Sterling during the Years 1889-93.

Year.	Rate of Exchange.			Imports.		Exports.		Total.	
	Tael.	s.	d.	Currency.	Sterling.	Currency.	Sterling.	Currency.	Sterling.
1889	..	..	..	Haikwan taels.	£	Haikwan taels.	£	Haikwan taels.	£
1890	..	..	..	9,427,971	2,219,501	2,514,037	591,846	11,942,008	2,811,347
1891	..	..	..	9,219,463	2,381,695	2,223,603	575,981	11,449,066	2,957,676
1892	..	..	..	8,464,719	2,020,818	2,336,539	559,796	10,771,258	2,580,614
1893	..	..	..	8,306,481	1,773,780	2,238,545	478,023	10,545,026	2,251,803
	..	..	..	10,832,572	2,121,379	2,307,669	451,918	13,140,241	2,573,297

From these tables it will be seen that the gross total value of the trade, that is, of imports, plus re-exports and exports, was 17,756,039 Haikwan taels against 14,666,847 Haikwan taels in 1892, and 14,459,206 taels in 1891, while the net total value, after deducting the value of the re-exports, was 13,140,241 Haikwan taels, showing an increase of 2,595,215 taels, or more than 24·5 per cent. over the net value in 1892, and of 2,368,983 taels—all but 22 per cent.—over that of 1891. On comparing the net total values in sterling for the three years, we find that the figures for 1893 show an increase of 321,494*l.*, or only a little over 14·2 per cent. over those for 1892, while they actually fall short of those of 1891 by 7,357*l.*

This apparent discrepancy will be made intelligible by a glance at the column in which the gold value of the Haikwan tael in the respective years is shown, when it will be seen that whereas the average rate of exchange of the tael in 1891 was 4*s.* 9½*d.*, in 1892 it was over 10 per cent. less, and that it fell to 3*s.* 11*d.* in 1893, a decline of over 18·25 per cent.

That there should have been, in spite of this enormous difference in the value of the tael, so substantial a balance as 321,494*l.* in favour of 1893 when compared with the previous year, must be regarded as a satisfactory proof that there was a very material expansion in the foreign trade of the port during the year under review. As will be seen, however, when I come to deal with the imports more particularly, this expansion was partly due to the fact that goods imported from the west, which have to be paid for in gold, figure in the returns at a largely increased silver value relatively, even where there was a diminution in the quantities imported, but mainly to the increased import of those articles that have to be paid for in silver.

Shipping.

Shipping.

The total number of foreign vessels under all flags that entered and cleared was nearly the same as in 1892, the entries being 970 against 973, and the clearances 972 against 966, an increase of three vessels in the total number of entries and clearances. The total tonnage, however, increased by 11,808 tons, the tonnage of entries being 882,643 tons against 879,284 tons, and of clearances, 884,044 tons against 875,505 tons.

British shipping.

Of the 1,942 vessels that entered and cleared with an aggregate tonnage of 1,766,687 tons, 1,517 ships, representing a tonnage of 1,439,362 tons were under the British flag. In other words the British flag covered a trifle over 78 per cent. of the total number of ships employed, and nearly 81·5 per cent. of the total tonnage; these percentages show a slight falling off as compared with 1892, when 80·7 per cent. of the number of vessels, and 84·4 per cent. of the tonnage, were British. Of the total value of the cargo carried over 75·6 per cent. was in British bottoms.

Of the total entries and clearances, 164, representing 79,754 tons, Sailing ships. were sailing vessels, the figures for 1892 being 163 vessels of 73,841 tons. The British flag recovered somewhat from the falling off shown in the previous year, the number being 94 vessels of 49,757 tons, as compared with 75 of 35,370, while the German flag declined again, becoming only 53 vessels of 21,066 tons, against 68 of 27,709 tons. American sailing vessels fell from six to three, but their average tonnage was over 1,000 tons, as compared with an average tonnage of 700 tons in 1892.

888 steamers of an aggregate tonnage of 843,039 tons entered, Steam and 890 representing 843,894 tons cleared during the year, a total shipping. of 1,778 vessels with a tonnage of 1,686,933, or an increase of two vessels and of 5,895 tons over 1892.

Of this total, 1,423 vessels, of an aggregate tonnage of British steam 1,389,605 tons, were British, being a falling off as compared with shipping. the previous year, in which, however, the number of British vessels would appear to have been exceptionally large, of 67 vessels and 36,069 tons.

The Chinese flag again came next, with a total of 190 vessels, Chinese. representing 161,626 tons, a considerable increase—61 ships and 51,287 tons—over 1892.

German steam shipping also rose again from 51 vessels, of German. 46,948 tons, to 77 vessels, of 55,602 tons.

Steam shipping under the Japanese flag showed a slight, and Other flags. under the Dutch and Spanish flags a considerable falling off, while there was a slight increase under the Danish and under the Swedish and Norwegian flags, and four American steamers visited the port during the year, there not having been any in 1892.

Nothing seems to have come of the proposal to establish lines of small sized steamers for local traffic with places in the neighbourhood, which was referred to in Mr. Forrest's report for 1892.

It will be seen from the following table that there was a Emigration. material increase in the number of British vessels employed in the carrying of emigrants to the Straits Settlements and in the number of passengers they carried, the figures having risen even above those recorded for 1891, which Mr. Forrest characterized as being abnormally high. The increase was mainly due to the withdrawal of steamers under the Dutch flag, which in former years took a large share of the passengers.

Year.	Number of Vessels.	Passengers.			Total.
		Men.	Women.	Children.	
1893	111	55,966	1,810	2,177	59,953
1892	97	37,218	1,498	1,595	40,311
Increase ..	14	18,748	312	582	19,642

*Exports.***Exports.**

The gross total value of the exports from Amoy in 1893 was 1,278,647*l.*, an advance of 6,993*l.* on that of 1892, in spite of the difference in exchange in favour of the latter year. Of this total, goods to the value of 1,047,696*l.* went to foreign countries, while the exports to other Chinese ports are valued at 230,951*l.* But in the above figures, the values of the re-exports are included, which amounted to 806,184*l.* to foreign countries, and 20,545*l.* to Chinese ports, or a total of 826,729*l.*, and when the value of the re-exports is deducted from the figures for both years, the result arrived at is that the net total export trade, that is the actual exports of local origin, showed a decline of 26,106*l.*, of which 23,390*l.* represented the falling off in the trade to foreign countries, and 2,716*l.* in that with Chinese ports. The value of the re-exports during the year exceeded that of 1892 by 33,099*l.*, those to foreign countries having been 33,956*l.* in excess, while those to Chinese ports fell short of the figures in the previous year by 857*l.*

Tea.

As regards tea, the staple export of Amoy, I am informed that the past season cannot on the whole be looked back to with satisfaction. Foreign buyers were hampered by the steady fall in sterling exchange, and the financial uncertainty existing in the United States, the principal market for Formosa teas, also put great difficulties in the way of a sound business being done with favourable results. The higher dollar price, which the low rate of exchange enables buyers here to give, instead of bringing a better quality of produce into the market, only caused an increase of supply at the expense of quality, and, indeed, introduced a new danger into the trade, for when, in September, matters in America improved slightly, and a brisker demand set in for Formosa teas, the native dealers took to shipping leaf from various points on the mainland to mix with the genuine product of the island, and bringing it back to Amoy as Formosa grown. If this trick is resorted to in the future, it is to be feared that there can be but one result—the extinction of the trade in Formosa teas—for once these teas lose their distinctive character their reputation in the American market will also disappear.

The year showed a marked increase in shipments by the steamers running to San Francisco and Vancouver, and thence overland to the Eastern States, and it would appear that this mode of transport is coming to be regarded more favourably than the old route via Suez Canal.

The following comparative table shows that there was once more a slight retrograde movement in the export of locally produced tea as compared with 1892, but that it was still in excess of that of 1891 and 1890, and that the export of Formosa teas also fell off, though it is still considerably in excess of that of 1890.

Description.	Quantity.			
	1893.	1892.	1891.	1890.
	Lbs.	Lbs.	Lbs.	Lbs.
Amoy teas	3,361,633	3,604,925	3,195,493	3,258,736
Formosa teas	18,906,760	19,743,795	20,275,419	15,087,967
Total	22,268,393	23,348,720	23,470,912	18,346,703

The following table gives the distribution of the above teas for the years 1893 and 1892:—

Destination.	Quantity.			
	1893.		1892.	
	Amoy Tea.	Formosa Tea.	Amoy Tea.	Formosa Tea.
	Lbs.	Lbs.	Lbs.	Lbs.
Great Britain	102,753	1,099,913	32,648	745,808
Hong-Kong	789,261	1,439,953	551,627	2,854,244
United States of America	1,661,443	14,667,939	2,200,376	14,598,281
Straits Settlements ..	273,711	479,649	287,651	589,829
Java	357,964	1,070,820	422,892	708,400
Siam	74,363	15,045	34,625	16,569
Philippine Islands ..	38,787	..	35,779	..
Cochin-China, &c. ..	36,169	22,827	5,340	7,848
British America	..	3,681	..	..
Japan	46	234	13,264	173
Total to foreign countries ..	3,334,497	18,800,061	3,584,202	19,516,152
Total to Chinese ports	27,136	106,699	20,723	227,643
Grand total	3,361,633	18,906,760	3,604,925	19,743,795

The whole of the above was Oolong, except 13,908 lbs. of Souchong. No Congou was exported during the year. It will be seen that the combined export to the United States of America has fallen off by 466,275 lbs., while that to Great Britain has increased by not far off the same quantity.

There is nothing special to remark in connection with the Other exports. other exports. Among the articles that show an increased export are bricks and tiles, hemp sacking, iron pans and iron ware, dried lichees, straw mats, paper, pomeloes, samshu and seeds, but in none of them is the increase of much significance. The export of Sugar. sugar shows a further falling off of 3,793,316 lbs. in quantity, and 7,004*l.* in value.

I may here notice, as being something very unusual now-a-

Silk : attempt
to revive the
industry.

days, the praiseworthy efforts that the Taot'ai of Changchow has been making for some years past to revive the silk industry in that prefecture. Once on a time Changchow was famous for the good quality of the silk produced there, but for want of care and foresight the manufacture, like so many other trades and industries in China, has become practically extinct. The present Taot'ai, who was appointed to the post somewhat over three years ago, at once set to work to try and re-start it, and in the first year bore all the expenses of planting mulberry trees, and of training men in the methods of caring for the worms and preparing the silk. In the second year, he tried very hard to get some of the wealthy natives to join him in his enterprise, but without much success. He then heard that a native Christian, a man who had been trained in the knowledge of medicine by Dr. Manson, formerly of Amoy, and who practises as a physician in Changchow, had taken up the cultivation of the silk worm, and sent for him, and asked him to use his influence with the other wealthy men of the city to get them to move. He has done everything to make the enterprise, which was taken up by other native Christians, a success, giving all the protection his influence can afford, and letting it be seen that what was being done has his approval. As a result, silk-worms have been cultivated during 1893 in five different places in the city and neighbourhood, for two of which the Taot'ai is himself responsible; but unfortunately, owing to want of care in the selection of the eggs, and to a lack of cleanliness and care in the matter of the rearing of the worms, at only one of the five places—that worked by the native Christians—was there any success, the worms at the other four dying before they came to maturity. The eggs for the Christians were purchased in Japan by the Rev. R. M. Ross, of the London Mission, and as care was taken to secure their being free from disease, and as the methods of the Christians in the actual rearing of the worms were much cleaner and more carefully carried out, they were fairly successful, though owing to the heavy preliminary expenses, this being the first year that the Christians have taken the thing up, the result has been a slight loss. I understand that they are persevering in their efforts as well as the Taot'ai, and better results are looked for in the coming year. The thing is remarkable, both on account of the unusual spectacle of an official endeavouring to stir the people up to take interest in what will be so beneficial to them if successful, and also on account of the official protection extended to native Christians in connection with their efforts to promote the attainment of the object he has in view.

Imports.

Imports.

The gross total value of the import trade during the year was 3,025,306*l.*; but of this total, foreign goods to the value of 77,198*l.*, and native produce to the value of 826,729*l.* were re-exported, leaving 2,121,379*l.* as the net value of the imports. This is an

increase of 347,599*l.* over the net total of 1892. Of the above total 1,243,321*l.* was the value of foreign goods imported, while the imports of native produce (after allowing for a sum of 476*l.*, the amount by which the re-export of some articles exceeded the import) contributed 878,058*l.* In 1892 the net total value of imports of foreign goods was 1,220,875*l.*, so that 22,446*l.* of the increase above noted was due to the increased import of foreign goods. A careful examination of the comparative table in Annex B, however, brings out very clearly the nature of the change in the trade that has set in, for it will be seen that in almost all the imports from gold using countries there is a marked falling off in the quantity of the import, though the decline in the silver values is not in all cases proportionate thereto, while the increase is contributed by articles classed amongst sundries, and chiefly by those articles which come from Asiatic countries which, like China, are silver using.

The following table which shows the percentages of the net total values of foreign imports for 1893 and 1892 which were contributed by the various classes of goods specified in Annex B brings out the change alluded to more clearly:—

Articles.	Percentage.	
	1893.	1892.
Opium	31·25	35·93
Cotton piece-goods	4·35	6·24
Indian yarn	15·30	22·16
Woollen goods	1·52	2·15
Metals	4·44	5·0
Flour	1·01	0·97
Kerosene oil	2·25	4·13
Rice.. .. .	14·31	..
Sundries	25·57	23·42

From the above figures it will be seen that whereas the share of the import trade contributed by the principal articles coming from Europe, and chiefly from Great Britain, was, in 1892, 71·48 per cent. of the total; in 1893 it fell to 56·86 per cent., while that of the articles classed as sundries, the greater part of which come from Asiatic countries, such as the Straits Settlements, Java, &c., rose from 28·52 per cent. in 1892, to 43·14 per cent. in 1893.

Opium.—The import of foreign opium of all kinds fell short of Opium. that in 1892 by 63,766 lbs. avoirdupois. The decline in Malwa, which has been noticed for some years past, still continued, but it was not so great in proportion, being only 3,188 lbs. less than 1892, while in the latter year there was a fall of 13,993 lbs., as compared with the import of 1891. The falling off was more specially noticeable in Patna and Benares opium, the import of which was 19,284 lbs. and 37,021 lbs. respectively less than in 1892. With

regard to Patna it has to be borne in mind that the import of 1892 was, as noted in the report for that year, largely in excess of the requirements of the port, having jumped from 664 lbs. in 1891 to 30,929 lbs., and that, consequently, a considerable decrease was to be expected in any case; but another factor which had a large share in producing this result, and this equally affected the import of Benares drug, was the raising of the prices of both varieties that followed the closing of the Indian mints to silver. The decrease in Persian opium was comparatively slight, 4,213 lbs., seeing that the import during 1892 had been nearly three times as large as that of 1891, a larger decrease might have been looked for, and very probably would have occurred, had it not been for the fact that this variety took the place of the higher priced Indian kinds. It is Persian opium to which the native drug makes the nearest approach in quality, and it is much used for mixing the latter. I find, however, a general consensus of opinion amongst those who have been good enough to furnish me with information, that the chief cause of the steady decline in the import of foreign opium is the increasing use, owing to its improved quality, and the increasing production of the native drug. Its quality is considered now to be very little inferior to that of Persian, so vast has been the improvement during late years, and this, combined with its cheapness and the comparatively light taxation to which it is subjected (and even that, by far the larger part of what is produced easily evades), is gradually, but surely, causing it to take the place of the more expensive, if finer flavoured foreign varieties of opium. It has been estimated that the production of native opium in 1893, in those districts in the neighbourhood of Amoy in which the poppy is cultivated, amounted to at least 533,333 lbs., double that of the previous year, nearly all of which appears to be consumed in the district; the total import of foreign drug of all kinds during the same period having been 608,859 lbs. The cultivation of the poppy in this portion of the province of Fokien is said to be increasing largely, and to be supplanting, to a great extent, that of wheat, and the reason given for this is that the farmers find that the former is more than thrice as profitable as the latter. That less wheat is grown than was the case formerly is indicated by the increase in the import of flour from America.

Native opium.

Cotton goods.

Cotton yarn.

The decrease in the import of cotton piece-goods of all kinds was so great that it may well be characterized as alarming, while the trade in cotton yarn from India, which of late years has been so flourishing, has received a blow from which it will take it a long time to recover. The net import of grey shirtings fell off by 13,176 pieces, that of white shirtings by 12,130 pieces, and T-cloths by 17,324 pieces, while that of Indian yarn was 6,088,813 lbs., against 8,446,020 lbs. in 1892, a fall of close on 28 per cent. This shrinkage was directly due, in a very great measure, to the heavy fall in exchange that resulted from the closing of the Indian mints to silver, as this at once sent up the price of every description of piece-goods, and took away from Bombay yarn the great advantage it once enjoyed in its cheapness.

Similarly in woollen goods a falling off is noticeable in almost all articles, except in Metz cordings, which show an insignificant rise of some 250 pieces, the import in most cases having fallen below the figures of 1891 also, so that the advance noted last year in this class of goods was only transitory. Woollen goods.

In metals, too, there was a marked decrease in the import of nearly all kinds, almost the only metal that showed any considerable increase in quantity being iron, of which 640,481 lbs. more arrived than in the previous year; being mostly old iron of but little value comparatively, the increase in value did not amount to much over 1,000%. The total net value of all metals imported fell short of that in 1892 by nearly 6,000%, but was practically very little below that of 1891. The decrease was most noticeable in tin and in lead, the import of which generally varies in proportion to the export of tea. Metals.

The value of the imports of the numerous articles classed as sundries was 536,487%, as compared with 348,282%, an increase of 188,205%, and, of this increase, no less a sum than 177,601% was due to the increased import of rice from Saigon, caused by the short crops here, and by a high market in Shanghai. In 1892 the import was 130,800 lbs., valued at 373%, while in 1893 it rose to 64,396,760 lbs., valued at 177,974%. The trade was, as usual, overdone, and, though handsome profits were realized at first, these were more than counterbalanced by the losses resulting from the later shipments. Foreign sundries.

Amongst the more important of other articles which contributed this increase may be mentioned American flour, the import of which rose from 3,223,616 lbs. to 3,619,467 lbs., and Japanese matches, of which 486,544 gross, valued at 16,401% were imported, as compared with 381,419 gross, valued at 14,997% in 1892; side by side with this increase there was a very large falling off in European matches, the import of which fell from 18,099 gross, of the value of 2,583%, to 3,089 gross, valued at 400%; in fact it may be said that Japan has now practically driven European matches out of this market. Flour. Matches.

The steady advance noted in the last report in the import of kerosene oil met with a check during 1893, the quantity imported having fallen from 2,364,900 to 1,533,290 gallons, though this is still much in advance of the import in 1891. A noticeable feature is the advance made by Russian oil, which appeared as a competitor in this market for the first time in 1892, when 469,870 gallons were imported; in 1893 the import reached 777,910 gallons, being 22,530 gallons in excess of that of American oil. During the year the construction of tanks for storing kerosene oil in bulk was commenced, and it is expected that they will be completed by the middle of this year. There are to be two large circular tanks, and one smaller one; the combined capacity will be 900 tons of oil, about 300,000 gallons. So far, no objection to their erection has been made by the Chinese local authorities, and the promoters of the scheme have secured the goodwill of the natives in the neighbourhood of the place where they are situated, by employing local Kerosene oil.

labour as far as possible; they have also been very judicious in the selection of the site, which, being a hollow surrounded on three sides by a high cliff, ensures that danger to houses in the neighbourhood is reduced to a minimum.

Native imports. The import of native produce shows a very considerable increase. In 1892, the net total value was 552,905*l.*, while in 1893 it was 878,058*l.*, an increase of over 58 per cent., notwithstanding the difference in exchange between the two years. It will be seen from the Table in Annex B that nearly every article of native produce therein specified contributed to this increase.

Beancake. Beancake, the import of which, in 1892, was 6,089,464 lbs. in excess of that in 1891, again shows an increase of 6,066,131 lbs. in quantity, and of 27,276*l.* in value, notwithstanding the fall in exchange. Beans, on the other hand, show a shrinkage of 2,432,142 lbs., though the silver value exceeded that in 1892 by no less than 41,159 taels; this is noticeable, inasmuch as, with a largely increased import in 1892, the value showed a notable falling off as compared with 1891.

Raw cotton. An advance of 237,404 lbs. in quantity, and of 4,687*l.* in value, is seen in the import of raw cotton, and, side by side with the enormous import of foreign rice from Saigon, that of native rice also rose by 4,943,177 lbs., representing a rise in value of 11,134*l.*

Tobacco. Another item in the list that calls for special remark is that of leaf tobacco, the import of which was 1,547,368 lbs. in quantity, and 10,619*l.* in value, in excess of that of 1892.

Wheat. A similarly large import of wheat, 8,003,611 lbs., representing a value of 9,026*l.*, over that of the previous year, tends to confirm the statement that the poppy is supplanting this cereal in the neighbouring districts. This trade in native imports is really only a portion of the home trade of China, and is only classed as foreign, because it affords employment to foreign shipping and Chinese owned ships of foreign type, and this enormous increase in its volume and value in the space of one year only shows more clearly the damage that the inordinate appreciation of gold has done to the real foreign trade.

Transit trade. The trade under transit passes appears to flourish and grow apace, the number of inward transit passes having risen from 1,245 to 1,442, and outward passes from 326 to 390; of the latter 141 only were issued to the British merchants against 172 in 1892. There is no remarkable difference in the commodities conveyed either way under these passes.

Revenue. The revenue accruing to the Chinese Government from the foreign trade of the port during the year showed a very considerable falling off as compared with 1892, the total having been 909,351.54 Haikwan taels (178,081*l.*) against 978,186.41 Haikwan taels (203,883*l.*). The decline is noticeable under all the headings, except coast trade duty and tonnage dues, a result that was not surprising when the shrinkage in the import of opium, Manchester goods, and Bombay yarn, and in the export of the staple produce, tea, is taken into consideration.

In conclusion I have to express my acknowledgements to Mr. Carrall, the Acting Commissioner of Customs, for his courtesy in allowing me to have access to the returns prepared in his office, prior to publication, and to those members of the mercantile community who were good enough to furnish me with information about matters connected with the trade of the port, to whom I am under great obligations. It may, perhaps, not be deemed out of place to add a few words of a more or less personal nature. It will be readily conceded, that, in order to write a useful report on any subject, it is at any rate desirable that the writer should have some degree of previous knowledge of that subject. This qualification I cannot claim to possess in writing of the trade of Amoy in 1893, as I did not come to the port till after the conclusion of that year. To the difficulty that is due to this cause, coupled with the fact that, in the interval that has elapsed since my arrival, I have had, in the midst of unusually pressing current work, to try to master the details of numerous most intricate cases, must be attributed in great measure both the meagre character of this report, and the delay that has taken place in its compilation.

Annex A.—RETURN of all Shipping at the Port of Amoy during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	47	24,859	710	694,057	757	718,916
Chinese ...	...	...	95	80,813	95	80,813
German ...	26	10,183	39	28,119	65	38,302
Japanese ...	...	...	16	13,920	16	13,920
Dutch ...	...	...	2	1,344	2	1,344
Spanish ...	...	...	8	5,232	8	5,232
American ...	3	3,020	4	10,762	7	13,782
Swedish and Norwegian ...	6	1,542	8	5,216	14	6,758
Danish ...	...	...	6	3,576	6	3,576
Total ...	82	39,604	888	843,039	970	882,643
„ for the year preceding ...	83	27,472	890	841,812	973	879,284

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	47	24,898	713	695,548	760	720,446
Chinese ...	...	...	95	80,813	95	80,813
German ...	27	10,883	38	27,483	65	38,366
Japanese ...	...	...	16	13,920	16	13,920
Dutch ...	...	...	2	1,344	2	1,344
Spanish ...	...	...	8	5,232	8	5,232
American ...	3	3,020	4	10,762	7	13,782
Swedish and Norwegian ...	5	1,349	8	5,216	13	6,565
Danish ...	...	...	6	3,576	6	3,576
Total ...	82	40,150	890	843,894	972	884,044
„ for the year preceding ...	80	26,369	886	839,226	966	875,595

Annex B.—RETURN of Principal Articles of Export from Amoy
during the Years 1893-92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Bags, hemp	Pieces ...	725,915	£ 4,794	729,483	£ 5,054
Bamboos and bamboo ware	...	...	5,042	...	4,551
Beans	Lbs. avoir.	1,616,118	5,043	2,256,687	5,163
Bricks and tiles...	Pieces ...	4,357,208	5,411	2,856,712	4,092
China ware, coarse ...	Lbs. avoir.	2,378,605	6,986	2,764,781	8,559
Fish, dry and salt ...	...	168,987	1,246	294,301	2,714
Flower roots	Pieces ...	2,168,698	2,365	2,577,724	2,789
Gold leaf, real	Sheets ...	11,268,000	1,702	11,762,000	1,950
Grass cloth, fine ...	Lbs. avoir.	22,106	5,194	24,800	6,366
Hemp sacking	Pieces ...	296,950	4,242	282,400	4,522
Iron pans	Lbs. avoir.	1,038,500	6,069	863,025	5,567
Ironware	...	883,104	3,386	324,111	3,441
Joss sticks	...	178,105	3,423	207,896	4,326
Lichees, dried	...	456,436	4,039	352,207	2,820
Lung-ngans	...	1,125,510	9,220	1,920,200	17,712
Mats, straw	Pieces ...	137,100	4,026	84,500	2,707
Medicines	...	...	2,286	...	2,489
Oysters, dried	Lbs. avoir.	147,928	1,728	277,301	3,311
Paper	...	7,036,656	61,141	6,498,879	60,884
Preserves	...	688,305	9,096	774,701	11,148
Pomeloes... ..	...	1,907,732	3,001	1,652,345	2,827
Samshu, medicated ...	...	930,896	12,517	793,984	11,217
Seeds	...	1,134,942	7,308	327,263	3,620
Sugar—					
Brown	...	11,276,112	41,826	12,466,053	47,838
White	...	767,804	5,453	1,299,015	10,067
Candy	...	9,236,762	98,134	11,298,016	94,522
Tea, black	Lbs. ...	22,268,398	863,574	23,848,720	839,031
Tobacco	...	1,167,332	22,297	1,191,544	26,045
Turnips	...	652,998	2,345	898,339	2,877
Umbrellas, paper ...	Pieces ...	736,026	9,362	423,802	5,499
Vermicelli and macaroni	Lbs. ...	2,131,646	12,561	2,135,636	13,662
Wood planks, tea ...	Boxes ...	709,791	11,075	530,127	9,063
Other articles	Value ...	...	52,755	...	44,951
Total	...	...	1,278,647*	...	1,271,654†

* Exchange: Haikwan tael = 3s. 11d.

† Exchange: Haikwan tael = 4s. 3½d.

NET EXPORT.

	Value.	
	1893.	1892.
	£	£
Gross total exports as above ..	1,278,647	1,271,654
Re-export of native produce ..	826,729	793,630
Net total of export trade ..	451,918	478,024

RETURN of Principal Articles of Import to Amoy during the
Years 1893-92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Opium—					
Malwa	Lbs. ...	18,552	13,272	21,740	16,438
Patna	" ...	11,645	7,271	30,929	22,218
Benares	" ...	390,150	245,342	427,171	283,613
Persian... ..	" ...	188,462	123,705	192,675	116,462
Prepared	" ...	50	54	...	...
Cotton goods—					
Shirts—					
Grey, plain ...	Pieces ...	18,396	6,063	32,112	10,984
White "	" ...	47,315	23,068	59,445	31,797
Dyed "	" ...	5,640	2,209	5,688	2,427
Dyed, figured, &c.	" ...	4,173	2,370	2,977	1,842
Turkey reds ...	" ...	1,968	857	7,974	3,745
T-cloths	" ...	49,697	13,659	87,021	19,762
Indian yarn ...	Lbs. ...	6,088,813	190,130	8,446,020	270,537
Other cotton goods	" ...	...	5,596	...	5,122
Canvas	Bolts ...	127	224	239	467
Woolen goods—					
Camlets, English	Pieces ...	2,253	4,412	3,798	8,110
Spanish stripes	" ...	917	2,070	942	2,445
Italian cloth ...	" ...	1,699	1,504	3,581	2,967
Metz cording ...	" ...	1,267	3,284	1,110	3,145
Thread	" ...	38,352	3,264	48,935	4,577
Other woollen goods	" ...	...	4,404	...	4,947
Metals—					
Iron	Lbs. ...	2,030,652	4,978	1,390,271	3,902
Tin, in slabs ...	" ...	968,681	41,334	1,027,636	44,905
Lead, in pigs ...	" ...	445,935	2,577	592,689	4,055
Quicksilver ...	" ...	29,857	2,704	89,900	4,015
Other metals ...	" ...	...	3,503	...	4,121
Sundries: Foreign—					
Beef, dried ...	Lbs. ...	451,746	2,873	372,992	2,724
Bêche-de-mer ...	" ...	1,116,960	27,722	967,912	23,275
Bird's nests ...	" ...	7,070	9,613	7,261	10,261
Braid, llama ...	" ...	17,741	2,230	20,357	2,769
Coal	Tons ...	5,130	6,023	4,572	5,858
Cotton, raw ...	Lbs. ...	170,533	2,866	1,068,704	16,299
Cuttlefish ...	" ...	223,330	5,005	182,549	4,428
Dyes, aniline ...	Tins ...	59,413	2,374	76,435	2,789
Fish—					
Dried	Lbs. ...	2,286,466	20,957	1,286,887	12,488
Salt	" ...	2,317,815	17,023	2,300,619	19,594
Fans	Pieces ...	997,635	3,001	929,080	2,688
Flour, American	Lbs. ...	3,619,467	12,597	3,223,616	11,852
Ginseng	" ...	24,620	29,460	25,569	32,936
Leather	" ...	230,417	4,380	133,107	2,637
Lily flowers, dried	" ...	554,676	5,283	252,876	3,275
Mangrove bark ...	" ...	1,342,855	1,754	1,249,203	1,905
Matches—					
European	Gross ...	3,089	400	18,099	2,583
Japanese	" ...	486,544	16,401	381,419	14,997
Mats, ree	Pieces ...	1,225,020	7,916	1,000,300	7,027
Medicines	" ...	...	4,599	...	4,788
Mussels... ..	Lbs. ...	792,220	5,810	563,128	5,912
Oil, kerosine—					
American	Gallons ...	755,380	13,798	1,895,030	41,048
Russian	" ...	777,910	14,213	469,870	9,450
Prawns... ..	Lbs. ...	1,834,288	24,891	1,775,749	27,856
Rice	" ...	64,396,760	177,974	132,800	373
Shell-fish	" ...	285,601	4,513	178,045	3,813
Silk goods, various	" ...	10,550	6,045	11,960	7,692
Sinews, cow	" ...	324,417	6,712	817,705	7,135
Wine	" ...	...	1,955	...	2,233
Other foreign sundries	" ...	...	98,074	...	57,699
Native produce—					
Beancake	Lbs. ...	79,126,944	155,986	73,060,813	128,710
Beans	" ...	71,066,926	194,908	88,499,068	203,744
Cloth, native ...	" ...	48,224	2,833	33,885	2,162
Coal	Tons ...	4,714	3,693	4,827	4,123
Cotton, raw	Lbs. ...	2,107,429	49,961	1,870,025	45,274
Dates	" ...	408,035	1,933	294,835	2,303
Fish, dried and salt	" ...	504,817	4,084	275,915	2,567
Fungus... ..	" ...	105,829	3,430	99,628	3,862
Ginseng	" ...	2,067	7,285	1,865	6,193
Hemp	" ...	181,678	2,821	116,061	2,384
Lily flowers	" ...	459,139	4,488	165,781	2,242

(1778)

B

RETURN of Principal Articles of Import to Amoy during the
Years 1893-92—continued.

Articles		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Native produce—con- tinued—					
Mats	Pieces ...	45,533	1,834	54,294	2,412
Medicines	...	...	4,508	...	4,929
Prawns... ..	Lbs. ...	3,185,823	41,538	3,007,689	46,027
Rice	" ...	20,217,680	58,692	15,374,457	47,558
Samshu	" ...	1,439,586	12,021	905,477	7,687
Seeds	" ...	5,157,503	28,816	3,032,237	17,300
Silk piece-goods	" ...	17,968	13,348	19,536	16,004
Tea, black	" ...	3,926,386	162,371	...	...
Tobacco leaf	" ...	1,686,063	12,585	138,685	1,966
Vermicelli	" ...	1,208,950	21,365	1,237,759	13,635
Wheat	" ...	36,088,884	53,006	28,085,273	44,980
Other native produce	" ...	...	39,078	...	30,163
Total	...	...	2,121,855	...	1,857,100
Excess of re-export over import in some articles ...	...	...	476	...	83,320
Net total imports	...	...	2,121,379*	...	1,773,780†

* Exchange: Haikwan tael: = 3s. 11d.

† Exchange: Haikwan tael = 4s. 8½d.

	Value.	
	1893.	1892.
	£	£
Net total imports as above ..	2,121,379	1,773,780
Re-exports of foreign goods ..	77,198	86,550
Re-exports of native produce ..	826,729	793,630
Gross total of import trade ..	3,025,306	2,653,960

Annex C.—TABLE showing Total Value of all Articles Exported from and Imported to Amoy from and to Foreign Countries during the Years 1893-92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	49,811	28,214	8	21
Hong-Kong	93,200	132,050	997,600	1,087,524
Singapore and Straits ..	114,520	110,984	141,270	149,896
United States of America	644,153	636,472	20,525	30,919
Java	97,490	86,705	437	4,562
Philippine Islands ..	34,825	34,289	4,305	4,628
Japan	832	265	9,936	11,931
Siam	9,919	6,845	28,939	2,591
Cochin - China, Tong-king, and Annam ..	2,767	1,306	98,485	2,868
Continent of Europe (excluding Russia) ..	..	..	..	7
Russia (by sea) ..	..	..	12,946	2,450
British America ..	179	..	..	..
Australia	..	..	..	..
Total	1,047,696*	1,037,130†	1,314,451‡	1,297,397§

NOTE.—Exchange: 1 Haikwan tael = 3s. 11d. in 1893; 4s. 3½d. in 1892.

* Gross export, including 806,184*l.* re-export native produce.

† " " 772,223*l.* " " " "

‡ Gross import, including 4,090*l.* re-export. " " " "

§ " " 86,550*l.* " " " "

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ON THE

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1299. Dantzic	7d.	1359. Cadiz	1½d.
1300. Sofia.. ..	2½d.	1360. Marseilles	1½d.
1301. Mexico	1½d.	1361. Brest	1d.
1302. Paris	1d.	1362. Syra.. ..	2½d.
1303. Buenos Ayres	½d.	1363. Suakin	1d.
1304. Tangier	2½d.	1364. Callao	1d.
1305. Somali Coast	½d.	1365. Piræus	2d.
1306. Porto Rico	1d.	1366. Stettin	2d.
1307. Paramaribo.. ..	1d.	1367. New Orleans	2½d.
1308. Oporto	1½d.	1368. Angora	1d.
1309. Naples	½d.	1369. Antwerp	2d.
1310. Salonica	2½d.	1370. Genoa	3½d.
1311. Valparaiso	2d.	1371. Batoum	2d.
1312. Mozambique	1d.	1372. Rouen	2½d.
1313. Odessa	1½d.	1373. Santo Domingo	½d.
1314. Honduras	2½d.	1374. Nantes	1½d.
1315. Batoum	4d.	1375. Taganrog	2½d.
1316. Quilimane	1d.	1376. Ispahan	4½d.
1317. Copenhagen	1d.	1377. Leghorn	2d.
1318. Lima	1d.	1378. Cagliari	1d.
1319. New York	1d.	1379. Boston	1d.
1320. Baghdad and Bussorah	1d.	1380. Palermo	3d.
1321. Rio de Janeiro	3d.	1381. New York	2d.
1322. Réunion	3½d.	1382. Zanzibar	2d.
1323. Berné	1d.	1383. Naples	1½d.
1324. Kiukiang	½d.	1384. Constantinople	2d.
1325. Resht	3½d.	1385. Buenos Ayres	5½d.
1326. Florence	1d.	1386. Caracas	1½d.
1327. Hakodate	1d.	1387. Vienna	1½d.
1328. Paris	2d.	1388. Madeira	½d.
1329. Paramaribo.. ..	1½d.	1389. Panama	1½d.
1330. St. Petersburg	2½d.	1390. New Orleans	2½d.
1331. Patras	1½d.	1391. Manila	2d.
1332. Calais	2½d.	1392. Foochow	1d.
1333. Loanda	1d.	1393. Ningpo	1d.
1334. Bordeaux	2½d.	1394. Chinkiang	1d.
1335. Taganrog	1d.	1395. Tamsui	1d.
1336. Galveston	8½d.	1396. Chungking	1½d.
1337. Riga.. ..	2d.	1397. Philadelphia	3½d.
1338. Batavia	1½d.	1398. Bilbao	2½d.
1339. Boston	1½d.	1399. Dunkirk	1d.
1340. Baltimore	1½d.	1400. Amoy	1½d.

No. 1401.

Reference to previous Report, Annual Series No. 1192.

CHINA.

TAINAN.

Consul Hurst to the Earl of Kimberley.

My Lord,

Tainan, March 26, 1894.

I HAVE the honour to forward herewith my Report on the Trade of Tainan for the year 1893.

I have, &c.

(Signed) R. W. HURST.

Report on the Trade and Commerce of Tainan for the Year 1893.

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Total Trade.

The total trade of the port in foreign vessels amounts to Diminution in 659,161*l.*, as against 682,647*l.* in 1892; but in the returns for 1893, total trade. the value of the opium imported was taken at the net import value plus the customs duty of 18*l.* 3*s.* per cwt., whilst the duty was omitted from the calculation in preceding years. This swells the returns of imports by 57,778*l.* Deducting this amount to render the comparison a fair one, the net value of the trade is thus (1771) A 2

601,383*l.*, showing a falling-off as compared with the preceding year of 81,264*l.* in the sterling value of the trade, or nearly 12 per cent. This is entirely due to a depreciation in silver of rather more than a similar percentage, the Haikwan tael, which was reckoned at 4*s.* 6*d.* in last year's trade returns, being in the year 1893 valued at 3*s.* 11*d.*

Imports.

Opium.

The chief foreign import is opium, valued at 236,522*l.* out of 344,480*l.*, the total value of the imports. Persian opium is almost in possession of the market, Patna having no longer a place in the returns, and Benares showing a diminution.

Advance in price of Persian opium.

The price of Benares has remained fairly steady, but there has been a steady advance in that of Persian exhibited throughout the year. Starting in January at 382 dol. per cwt. for new opium, and 361 dol. for old, it rose last December to 537 dol. per cwt. for old, and 525 dol. for new. This advance is due to the following causes, viz., to the fall in exchange caused by the depreciation of silver, to a short crop in Persia which was said to be from 30 per cent. to 40 per cent. less than average, the holding back of supplies of Persian in Bombay, the reduction in the quantity of the Bengal drug auctioned monthly by the Indian Government, and lastly to the partial failure of the crop in Northern China. The general "unhealthiness" of the China trade and the tightness of money have prevented, to some extent, even a further upward movement.

Causes.

The increase in price has led to a marked increase in the use of opium pills imported from Hong-Kong and Amoy, and made here.

Native opium is imported at Tamsui from Wênchow and Tai-chow; none is imported here. About a year ago small shipments came over by junk from the Tungan district near Amoy, but were not found profitable, as the price was too high to admit of its competing with Persian drug here, unless "smuggled," which is done, to a small extent, by the supercargoes and crews of native junks.

Qualities of Chinese opium.

The native Tungan opium is a strong drug like Benares, but is a much inferior preparation. The ash, on being burnt, is of a very black colour; moreover, it does not stand repeated smoking like Persian.

Benares.

Old smokers prefer Benares, and it is used along with Persian to increase the strength and improve the flavour.

Comparison of "touch."

The proportion of pure opium "touch" in the "cakes of commerce" shows as follows:—

Benares, 50 per cent. to 55 per cent. (some say 53 per cent. to 56 per cent.), the drug being smoked once, and then, after the addition of fresh drug on each occasion, twice at most more.

Persian, 80 per cent. to 85 per cent., the drug being smoked two to three times, and then, after the addition of fresh drug on each occasion, three to five times.

Native, 60 per cent. to 65 per cent. (some say 65 per cent. to

70 per cent.), the drug being smoked once or twice (not often twice), and then, after the addition of fresh drug in each case, twice more; after the second or third smoke it is sold for consumption by the poorer classes.

Consumption of opium has, during the year, been generally more restricted consequent upon the high prices ruling.

Sesamum seed cake is now quite out of use for opium adultera-^{Opium} tion, being supplanted by "Tientsin" cake, a repulsive preparation ^{adulteration.} of boiled-down skins and all kinds of refuse of a "gelatinous" nature, to which in boiling has been added opium, pod, stalk, husk, &c.—in fact, anything that would impart to it the taste or smell of opium.

It is used for the adulteration of opium in increasing proportions; last year two or three parts of the cake to seven or eight of opium; this year three or four parts of the cake to six or seven parts of opium. The price in 1892 averaged from 17 dol. per cwt. to 25 dol. per cwt., this year 34 dol. per cwt. to 42 dol. per cwt. It is imported under the name of "medicinal cake" mostly by foreign vessels, but to some and to an increasing extent also by junk. The poorer classes buy a mixture of nearly equal parts of opium and "Tientsin cake."

The cake is sold by the dealers with each chest of opium sold; the adulteration being done by the wholesale dealers in prepared opium, and again by the retail dealers.

The amount of these imported is inconsiderable. Cotton goods ^{Cotton and} to the value of 14,617*l.* were imported in 1893, as against 18,308*l.* ^{woollen goods.} in 1892; and woollen goods to the value of 14,372*l.*, as against 18,042*l.* last year. This falling-off is partly due to the increasing poverty of the people, but chiefly to an advance in price due to the fall in exchange. English goods are being supplanted by those of ^{Japanese} Japan, whose cheap bright-coloured printed cottons and cotton and ^{goods fancied.} woollen crapes find increasing favour, and by the Northern Chinese cotton goods, which wear well: these are chiefly imported by junk.

The consumption of kerosene is likely to steadily increase; ^{Kerosene oil.} the returns show a decrease, but this is probably owing to the large stocks in hand at the end of 1892.

American oil is preferred to Russian, as the latter smokes and ^{American} does not burn so well; the difference in price is 4*d.* or 5*d.* per case ^{preferred.} in favour of Russian. The latter shows continued improvement in quality.

Native oil is less used as a lamp oil consequent on the intro- ^{Native oil.} duction of kerosene; but its consumption among the poor as a culinary oil has increased. The crop of peanuts both in Formosa and the Pescadores was, in 1893, much smaller than usual; in the latter place the crop was nearly all destroyed by typhoon weather, and large imports came by junk from Ning-po and Foochow.

The import of lamps is steadily increasing: the kinds in ^{Lamps} demand being mostly common Canton makes and the inferior grades of German makes.

Exports.

Leading exports.	The leading articles of export are sugar, camphor, and turmeric, sugar being responsible for an export valued at 249,218 $\frac{1}{2}$ out of a grand total of 314,681 $\frac{1}{2}$.
Sugar.	The sugar crop for 1894 promises to be larger than in the past 2 or 3 years, owing, in some measure, to the increased area under cultivation due to the good prices obtained in the season 1892-93; but chiefly to the comparative immunity from damage to the crops by typhoons, rains, and consequent floods. Still, canes, though fine in appearance, and large, long, and thick, are not so full of "saccharine" as was expected, and previous estimates of 380,000 cwts. to 400,000 cwts. in the Takow district are reduced since manufacture commenced to 310,000 cwts. or 330,000 cwts. The "Takow" brown sugar holds its own fairly well in Japan, but the competition with Manila sugars imported into Japan, via Hong-Kong, where it is mixed with Straits or Java sugars, or sent unmixed, is very keen.
Prices.	Tainan-fu now supplies practically only two qualities, "Shang-tou" and "chung-tou" for Northern China markets. "Kapan," or ordinary brown, has not been manufactured as formerly since enquiry for Australia, America, and Europe ceased. On the whole, consequent upon damage to Amoy, Swatow, and Canton sugars, prices paid have been high both for Takow and Tainan-fu sugars; but, on first and second contracts, sellers to shippers lost heavily; nearly 1 dol. per cwt. in some cases was paid to cancel contracts, due to the advance in the North resulting from short arrivals from Southern China.
Likin tax.	The likin tax of about 2 <i>d.</i> per cwt. is collected by a system of passes issued in Tainan-fu to applicants bringing down sugar. In Takow shippers (Chinese) and contractors receive a retaining fee and the tax is collected on their declarations checked by the customs returns to the Taotai. It is an onerous tax and to some extent prevents the development of trade. Junks evade the tax by paying a lump sum for a declaration of capacity, generally half the true capacity, or by loading at places where there are no likin stations.
Introduction of iron cane-crushing mills of European make.	Referring to the efforts made to introduce iron cane-crushing mills into this island, I may state that it seems probable that these efforts have met with permanent success. A mill has been procured and erected for a military official, the possessor of somewhat large sugar plantations, some 8 miles from Tainan-fu, which has given such excellent results as to convince the most sceptical of the substantial advantages to be derived from its substitution for the crude native stone rollers. It must not be inferred from this that there will be an immediate and simultaneous demand all over the island for foreign cane-crushing mills. Chinese are far too slow-moving and cautious for that; but it is none the less a matter for congratulation that one mill has actually and by popular assent ousted the native rival set up as a stand-by in case of the failure, which the public voice had previously declared

must inevitably overtake the foreign intruder, and that the latter is now working to the satisfaction and astonishment of the people from far and near.

Business in camphor is steadily increasing, 7,530 cwt. of the Camphor value of 25,523*l.* having been exported in 1893, as against trade. 5,441 cwt., valued at 16,272*l.*, in the previous year; and this notwithstanding a vexatious interference on the part of the camphor authorities in the interior of the island with the business of a leading British firm, which required much perseverance and determination on the part of my predecessors to overcome. So far supplies of the drug have not exceeded the demand for London, Hamburg, India, Straits Settlements, Java, &c. Prices have fluctuated greatly. Early in January the price was as high as 47 dol. per cwt., in April 33 dol., advancing in July to 41 dol., and declining again to 36 dol. 50 c. at the end of the year.

Japan camphor, a better prepared and cleaner article, commands Japan a higher price, but manufacture is under Government restrictions; camphor. in January 52 dol. per cwt., in April 36 dol., and at the end of the year 40 dol.: the supply has been small and irregular. The above prices refer to the Hong-Kong market. Contracts in the country are running out, and 5 dol. advance is asked for renewals.

During the year new districts for working camphor have been New districts. opened up, viz., Yunlin in the beginning of the year and Kagee at the end.

An examination of the trees to the south of the island proved unsatisfactory, and operations there were discontinued. Districts to the immediate east of Tainan-fu, but far inland, are being tried, but the absence of roads is a bar to operations.

Turmeric has, within the last 2 years, been shipped away by Turmeric. foreigners, consequent upon a partial failure of Indian crops, and shipments have been made to Hong-Kong for India and European markets. Owing to this enquiry prices last year went up rapidly, and were particularly profitable to contractors and growers. The stock was exhausted without meeting the demand.

The rice crops for the year were fully up to average, better at Rice. Tainan-fu than Takow. There has been a large export from the south by junk to Namoa and Swatow. This has reduced the supplies available for local consumption, and consequently prices have advanced largely. The export is prohibited by the authorities, but none the less it goes on.

General Remarks.

Trade in Formosa is heavily handicapped by likin and other Heavy charges such as the fang fei (protection) tax on camphor, fixed taxation originally at 15 dol. per cwt., but now a proportionate part of the camphor produced is taken by the Government in lieu of a money payment; this tax is levied ostensibly to defend the camphor workers from the attacks of the aborigines, between whom and the Chinese there is a constant feud. hinders trade development.

A great impediment in the way of the agricultural prosperity Land tax.

of the island is the land tax, which is a heavy one and all the heavier from the fact that it is collected from the Government survey of property, while formerly it was based upon the declarations of the proprietor of the ground under cultivation, with an abatement for land of indifferent description. The tax has been and is the cause of the poorer land being put out of cultivation, and of a decrease of population in the interior, villages and hamlets showing as much as from 20 per cent. to 30 per cent. reduction in population.

I am indebted to Mr. Spinney, Commissioner of Customs, for inspection of the returns from which the tables accompanying this report are compiled, and to Mr. Moncrieff Wright and Dr. Wykeham Myers for the greater part of the information contained therein; as my own experience of the port, extending only to a few weeks, was necessarily very limited.

Table 1.—RETURN of all Shipping at the Port of Tainan during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.		Total Value of Cargoes.
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	
British	7	3,124	58	38,322	65	41,446	319,612
Chinese	...	...	1	703	1	703	36
German	6	2,564	7	4,687	13	7,251	11,606
Swedish and Norwegian	1	193	1	484	2	677	127
Japanese	...	...	3	3,609	3	3,609	13,099
Total	14	5,881	70	47,805	84	53,686	344,480
„ for the year preceding ...	10	3,860	84	55,689	94	59,549	326,443

CLEARED.

Nationality.	Sailing.		Steam.		Total.		Total Value of Cargoes.
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	
British	5	2,268	58	38,322	63	40,590	214,179
Chinese	...	...	1	703	1	703	...
German	6	2,564	6	4,300	12	6,864	58,046
Swedish and Norwegian	1	193	1	484	2	677	7,722
Japanese	...	...	3	3,609	3	3,609	34,734
Total	12	5,025	69	47,418	81	52,443	314,681
„ for the year preceding ...	11	4,307	84	55,689	95	59,996	356,204

Table 2.—RETURN of Principal Articles of Import into Tainan during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Foreign goods—					
Opium—					
Patna	Cwts. ...	...	...	2·81	185
Benares	" ...	160	12,784	226	13,446
Persian... ..	" ...	3,033	223,738	3,596	190,917
Cotton goods—					
Shirtings—					
Grey, plain	Pieces ...	16,627	5,641	18,144	6,702
White, plain	" ...	7,756	4,511	10,188	5,315
T cloths, 32 inches	" ...	7,013	1,305	5,842	1,111
Miscellaneous cotton goods	" ...	...	3,160	...	4,680
Woollen goods—					
Camlets, English	Pieces ...	3,073	5,324	3,635	7,126
Lastings, plain	" ...	1,607	2,181	1,648	2,576
Spanish stripes	" ...	399	822	401	1,082
Alpacas	" ...	1,542	1,195	2,267	1,651
Italian cloth	" ...	1,263	1,066	1,309	974
Miscellaneous woollen goods	" ...	...	3,794	...	4,633
Metals, miscellaneous	" ...	...	1,248	...	1,718
Kerosene—					
American	Gallons ...	189,020	4,464	302,040	8,072
Russian	" ...	...	...	100,000	2,700
Sundries	" ...	...	49,068	...	29,920
Native produce—					
Bags, hemp	Pieces ...	236,907	1,864	163,700	1,326
Cake stuff	Cwts. ...	915	3,947	458·93	1,716
Grass-cloth, fine	" ...	34	562	97·98	1,644
Jadestone ware	Pieces ...	4,705	77	...	1,019
Joss-sticks	Cwts. ...	338	1,265	626·96	1,062
Medicines	" ...	366	486	...	4,975
Silk piece-goods... ..	" ...	...	61	33·45	3,111
Tobacco, prepared	Cwts. ...	1,557	4,569	831·90	2,734
Wood poles	Pieces ...	6,820	2,817	5,573	2,111
Woollen and cotton mixtures	" ...	6,260	1,248	8,820	1,858
Miscellaneous	" ...	...	8,303	...	21,582
Grand total	" ...	...	344,480	...	326,443

Exchange: 1 Haikwan tael = 4s. 6d. in 1892, 3s. 11d. in 1893.

Table 3.—RETURN of Principal Articles of Export from Tainan during the Years 1893–92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Cwts.	£	Cwts.	£
Bamboo shoots.. ..	3,311	2,162	1,335	809
Camphor	7,530	25,523	5,441	16,272
Hemp	2,622	4,045	2,312	6,046
Lung-an pulp	4,435	3,345	3,032	9,225
Lung-ans, dried	5,428	1,833	7,256	5,396
Sugar, brown	572,058	223,342	665,042	257,675
„ white	34,988	25,906	50,565	36,324
Turmeric	35,436	13,733	24,190	9,466
Miscellaneous	..	7,933	..	3,562
Total	..	307,821	..	344,765
Re-exports—				
Foreign goods	..	6,657	..	11,304
Native „	..	203	..	135
Total of re-exports ..	..	6,860	..	11,439
Grand total	..	314,681	..	356,204

Exchange: 1 Haikwan tael = 4s. 6d. in 1892, 3s. 11d. in 1893.

Table 4.—RETURN showing the Total Value of all Articles Exported from and Imported into Tainan to and from Foreign Countries and Chinese Ports during the Years 1893–92.

Country.	Imports.		Exports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Hong-Kong	292,842	276,668	49,380	64,294
Japan	..	444	81,636	116,693
United States America	..	1,756	..	..
Total foreign countries	292,842	278,867	131,016	176,987
Chinese ports	51,638	47,576	183,665	179,217
Grand total	344,480	326,443	314,681	356,204

Exchange: 1 Haikwan tael = 4s. 6d. in 1892, 3s. 11d. in 1893.

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CHINA.

REPORT FOR THE YEAR 1893
ON THE
TRADE OF ICHANG.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1211.

*Presented to both Houses of Parliament by Command of Her Majesty,
JUNE, 1894.*

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1328. Paris	2d.	1389. Panama	1½d.
1329. Paramaribo.. ..	1½d.	1390. New Orleans	2½d.
1330. St. Petersburg	2½d.	1391. Manila	2d.
1331. Patras	1½d.	1392. Foochow	1d.
1332. Calais	2½d.	1393. Ningpo	1d.
1333. Loanda	1d.	1394. Chinkiang	1d.
1334. Bordeaux	2½d.	1395. Tamsui	1d.
1335. Taganrog	1d.	1396. Chungking	1½d.
1336. Galveston	8½d.	1397. Philadelphia	3½d.
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No. 1402.

Reference to previous Report, Annual Series No. 1211.

CHINA.

ICHANG.

Consul Everard to the Earl of Rosebery.

My Lord,

Ichang, February 28, 1894.

I HAVE the honour to enclose my Report on the Trade at Ichang for the year 1893. It must not for a moment be supposed that it is the Trade of Ichang, which is and I am afraid is likely to continue to be but trifling, as it is essentially a poor place.

I have, &c.

(Signed) C. W. EVERARD.

Report on the Trade and Commerce at Ichang for the Year 1893.

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Summary.

The total value of the trade which passed through the foreign customs at this port was 1,659,806*l.*, as against 2,510,779*l.* in the previous year, giving an apparent decrease of 850,973*l.*; but if the rate of the Haikwan tael, which in 1892 was taken at 4*s.* 10*d.*, be made the same as this year, which is 4*s.*, then the actual decrease (1741)

Total value of trade.

Actual trade of Ichang.	is only 418,079%. Of the above, goods to the value of 1,399,587 <i>l</i> . were re-exported, which leaves only 260,219 <i>l</i> . to represent the actual trade of Ichang, which is a decrease of 26,881 <i>l</i> . as compared with 1892.
Diminution in most of the foreign imports.	There was considerable diminution in almost all the foreign imports, but especially in Bombay cotton yarn, which was 47 per cent. less than the preceding year. The low exchange is probably answerable for the diminished import trade.
Increase of principal exports.	All the principal exports increased in quantity except white wax.
Steamers and chartered junks increased.	It may be merely that larger quantities of Szechuen produce were brought down in "chartered junks," and so passed through the foreign customs, and not that the actual export increased. Both steamers and junks chartered by foreigners increased in number, and British tonnage kept well to the fore, as will be seen by referring to the annexed shipping table.
Foreign "boiled opium."	A small amount of foreign "boiled opium" was imported, about half of which was retained for consumption in Ichang, but it is a mere drop in the ocean of Chinese opium that is smoked here.
Chinese cotton yarn.	The import of Chinese cotton yarn, manufactured at the Shanghai and Hankow Cotton Mills, is making progress, and is likely, before long, to compete seriously with the Indian yarn.
Transit trade decreased.	The transit trade with Szechuen continues to decrease, as junks chartered by Europeans are coming more and more into use.

Shipping.

Steamers.	296 steamers, with a total tonnage of 152,634 tons, entered and cleared, an increase of 34 steamers and 20,384 tons over 1892. Of the above, 174 were British, with a tonnage of 95,356 tons; the remainder were under the Chinese flag.
Chartered junks.	There were, in addition, 1,800 "chartered junks," with a tonnage of 47,534 tons; of these, 588 were chartered by British firms at Ichang, to convey merchandise to Chungking, and 520 were chartered by British firms at Chungking to take down Chinese produce to Ichang.
	These junks are on precisely the same footing as steamers.
	In November the China Merchants Company placed a large new steamer, the "Kwei-lee," on the Hankow-Ichang line. She registers 879 tons, has triplicate stern propellers, and is built of steel. On a draught of 5' 6" she can carry 900 tons of cargo, and on draught of 8', some 1,200 tons. She was built at Yarrow, was taken out to Shanghai in pieces, and was there put together again by Messrs. Farnham and Co.

Passenger Traffic.

Passengers.	162 foreigners and 10,632 Chinese travelled up and down between Hankow and Ichang in steamers, and 4 foreigners and
-------------	---

1,061 Chinese travelled to and from Chungking in "chartered junks."

Europeans in Ichang.

The total foreign residents in Ichang number 30, comprised as follows :—

Nationality.	Number of Residents.
British	13
Belgian	6
French	3
Swedish and Norwegian	4
German	2
Danish	1
American	1
Total	30

Foreign Firms.

There are 4 foreign firms, 3 British, and 1 American, but all except one are represented by Chinese agents.

The British firms are, Messrs. Jardine, Matheson and Co., Messrs. Butterfield and Swire, and the Chungking Transport Company.

Imports.

Foreign goods, principally cotton and woollen, to the value of 782,853*l.*, and native to the value of 797,431*l.*, making a total of 1,580,284*l.* were imported, as against a total of 2,509,044*l.* during 1892. Decrease in value of 928,760*l.* Foreign goods to the value of 693,495*l.*, and native to the value of 706,091 were re-exported. 96,949 cwts. of Bombay cotton yarn, valued at 325,752*l.*, were imported, as against 185,471 cwts., valued at 753,009*l.* the preceding year; decrease, 88,522 cwts. Only 67 cwts. of English yarn, as against 1,167 cwts. in 1892. The total value of cotton goods was 537,129*l.* The only articles which show any increase are sheetings, Italian cotton, and towels.

The following comparative table of the principal cotton goods imported during the past 3 years may be of interest:—

Articles.				1891.	1892.	1893.
Shirtings, grey..	..	Pieces	..	416,524	591,619	415,839
„ white	..	„	..	75,857	90,879	64,660
„ figured	..	„	..	5,973	21,664	3,187
T-cloths	..	„	..	7,585	8,504	7,740
Sheetings, English	..	„	..	5,370	11,774	11,930
Chintzes, furniture	..	„	..	100	55,158	32,769
Turkey-red cottons	..	„	..	19,124	31,932	15,570
Cotton lastings..	..	„	..	7,859	26,152	23,871
„ yarn, Indian	..	Cwts.	..	99,242	185,471	96,949

Woollen Goods.

Woollen
goods
decreased.

The total value of woollen goods was 71,769*l.* as against 115,936*l.* in 1892, or a decrease in value of 44,167*l.*

Imitation lastings, lustres and orleans, and Italian cloth, alone show increase; only 14,929 pieces of lastings were imported as against 23,591 pieces the previous year.

Metals.

Metals.

Iron wire, lead in pigs, copper wire, copper slabs, brass wire and quicksilver, to the value of 5,614*l.* were imported as against 1,172*l.* the preceding year.

Silk.

Silk goods.

The total value of silk goods was 275,205*l.* as against 375,811*l.* in 1892.

1,608 cwts. less of yellow silk; 8,528 cwts. less of refuse; 58 cwts. less of silk piece-goods and pongees; but 83 cwts. more of wild raw silk; 165 cwts. more of silk cocoons; 11,248 cwts. more of silk cocoons, refuse; and 23·74 cwts. more of ribbons, than in 1892.

Opium.

Foreign
opium.

4 cwts. of foreign "boiled opium," valued at 601*l.* were imported, but half of this was re-exported.

Chinese
opium.

3,066 cwts. of Szechuen opium, valued at 90,172*l.*, were imported in "chartered junks" as against 2,941 cwts. in 1892.

95 cwts. of Yunnan opium, valued at 3,639*l.* as against 160 cwts. in 1892.

The above is a mere fraction of what is brought down, both overland and in ordinary junks, but it is impossible to get at the statistics. To give a faint idea of the immense overland traffic, I may mention that, when I was one day taking a walk on the opposite side of the river, in the space of 3 hours I passed close on 100 coolies, who were carrying two packages apiece of Szechuen opium: each package is said to weigh 60 catties (80 lbs.). It

was being taken down to Sha Shih, a great trade centre about 80 miles below Ichang, on the left bank of the Yangtsze. This overland traffic goes on throughout the autumn and winter.

Oil.

53,004 gallons of American kerosene were imported as against Kerosene oil. 28,708 gallons in 1892.

This is only a fraction of the actual importation, but it is mostly brought up in ordinary junks, and consequently does not pass through the foreign customs. Russian kerosene does not appear to have yet penetrated to these parts.

Raw cotton, 6,153 cwts., valued at 7,238*l.*, as against 4,870 cwts. Raw cotton. in 1892.

150 pieces of Chinese cotton cloth as against 898 pieces; and Chinese cotton 2,253 cwts. of Chinese cotton yarn, valued at 5,679*l.*, as against cloth. 357 cwts. in 1892. These were manufactured at the Shanghai and Chinese cotton Hankow cotton mills. yarn.

13,575 cwts. of brown sugar were imported as against 3,879 cwts. Brown sugar. the preceding year.

Exports.

The total value of the local exports amounted to 79,522*l.* as against 85,370*l.* in 1892, apparent decrease 5,848*l.*, whereas by the customs returns, which are in taels, there is an increase of 44,355 taels equal, at exchange of 4*s.*, to 8,871*l.*

Vegetable tallow, which is one of the principal local exports, increased.

Coal.

13,019 cwts. of soft coal were brought down from the mines Soft coal. in the west of this province (Hupei).

None of these mines are worked scientifically, but are merely scratched in the old-fashioned Chinese manner.

Hard coal is found at a place called Ching Mên Chou, about Hard coal. 70 miles below Ichang.

Treasure.

Silver, in the form of sycee, was imported to the value of Treasure. 55,791*l.* and exported to the value of 127,590*l.*

Gold in bars was exported to the value of 12,888*l.*, and copper cash to the value of 824*l.*

The above all passed through the foreign customs: it is not possible to ascertain any idea, even of what goes through ordinary Chinese channels.

Transit Trade.

Transit trade. 665 inward transit passes were issued by the foreign customs as against 824 passes in the preceding year; of these, 183 passes
 Inward transit passes. were taken out by British firms, 344 passes by American, and 138 passes by Chinese. They covered goods for Szechuen to the value of 85,103*l.* made up as follows:—Cotton goods, value 53,262*l.*, of which cotton yarn stood for 51,840*l.*; woollen goods, 498*l.*; metals, 88*l.*; miscellaneous, 31,255*l.*

No outward transit passes. No outward transit passes were applied for.
 Transit dues. The dues collected on the above were 1,103*l.*

Customs Revenue.

Customs revenue The foreign customs collected during the year duties to the value of 23,704*l.* as against 23,647*l.* in the preceding year.

General.

1893, taking it all round, was a good year; both the spring and autumn crops, which include wheat, barley, rice, maize, cotton, and vegetable tallow, were ever so much better than in the preceding year, and, consequently, the people were contented and far more friendly towards the "foreign devils."

There was but little serious illness among the Chinese, and the summer was unusually cool. A great inundation had been prophesied, and in July, when one day the river rose to the level of the Bund, it looked as if it would be realised, but just then a break was made in the river bank some 80 miles below, which carried off the water and saved Ichang.

There were no serious fires in the autumn, which is quite exceptional.

During the year several new European buildings have sprung up, and the foreign quarter is now far more imposing than before the riot of September, 1891.

The foreign customs, which, ever since the opening of the port in 1877, has been located in a Chinese temple, commenced building European quarters in September, and will move into them during the summer of 1894.

The navigation between Ichang and Hankow, from November to April, when the river is low, is always hazardous, especially about "Sunday Island," which is about 120 miles below Ichang. It is not safe for any steamer to draw more than 5 feet at the utmost.

This year the neighbourhood of "Sunday Island" has been more than usually shallow, and the steamers have been frequently getting aground. The channel is constantly shifting, and much time has to be expended in searching for it.

The riverside population are still far from pleased at the advent of steamers, and they take every opportunity to throw stones and

mud at them, which the local authorities are either unable or unwilling to prevent, though frequently urged to do so.

Over 10,000 junks, of all sizes, exclusive of the "chartered" ones, are computed to have passed up and down between Ichang and Chungking during the year.

I am indebted to the courtesy of Mr. Selejoth, the Commissioner of Customs, for access to the customs returns, from which the accompanying tables have been compiled.

Table I.—RETURN of all Shipping at the Port of Ichang during the Year 1893, exclusive of Native Vessels not Entering at the Foreign Customs.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	520*	13,046	87	47,678	607	60,724
Chinese	290*	7,276	61	28,639	351	35,915
Total	810*	20,322	148	76,317	958	96,639
„ for the year preceding ...	764*	18,876	131	66,125	895	85,001

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	588*	16,162	87	47,678	675	63,840
Chinese	402*	11,050	61	28,639	463	39,689
Total	990*	27,212	148	76,317	1,138	103,529
„ for the year preceding ...	1,339*	37,221	131	66,125	1,470	103,346

* Chartered junks.

Table II.—RETURN of Principal Articles of Export from Ichang during the Year 1893, exclusive of Trade not passing through the Foreign Customs.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Copper tribute	Cwts. ...	12,261	37,980	12,261	44,805
Bristles	„ ...	6,150	11,154	4,892	9,965
Fungus	„ ...	2,448	4,936	5,294	13,280
Hemp	„ ...	20,667	24,305	22,202	31,549
Medicines	„ ...	...	105,607	...	110,265
Musk	Ounces ...	68,478	64,199	68,299	60,437
Nutgalls	Cwts. ...	15,947	26,798	12,089	24,541
Rhubarb	„ ...	6,882	28,908	5,819	29,535
Spelter, tribute	„ ...	9,523	7,200	...	...
Tallow, vegetable	„ ...	5,811	5,859	4,721	5,751
Varnish	„ ...	1,395	7,033	1,260	7,679
Wax, white	„ ...	8,663	46,574	9,789	63,595
Wool, sheep's	„ ...	12,820	21,538	11,621	19,660

NOTE.—Total exports, value, 79,522L.

Table III.—RETURN of Principal Articles of Import to Ichang during the Year 1893, so far as they passed through the Foreign Customs.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Cotton goods—					
Shirtings—					
Grey, plain	Pieces ...	415,839	133,068	591,619	228,759
White	" ...	64,660	22,631	90,979	38,476
T-cloths	" ...	7,740	2,709	8,504	3,596
Chintzes, furniture, &c. ...	" ...	32,769	10,488	55,158	21,327
Turkey red cottons	" ...	15,570	3,736	31,932	9,260
Cotton lastings, plain and figured	" ...	23,371	11,935	26,152	15,800
Handkerchiefs	Dozen ...	11,192	671	13,162	954
Towels	" ...	17,484	1,016	15,684	1,135
Cotton yarn—					
English... ..	" ...	67	285	1,167	5,926
Indian	" ...	96,949	325,752	185,471	753,009
Woollen goods—					
Camlets, English	Pieces ...	3,372	7,764	5,865	14,173
Lastings	" ...	14,929	20,900	23,691	39,908
Long ells	" ...	8,185	8,185	8,960	10,526
Cloth, Russian	" ...	2,079	10,395	3,697	22,294
Italian cloth, plain and figured	" ...	5,202	5,141	9,796	11,832
Bêche-de-mer, black	Cwts. ...	1,217	8,119	1,541	12,523
Brass buttons	Gross ...	55,658	16,697	66,780	24,166
Cuttle-fish	Cwts. ...	1,083	1,820	4,583	9,722
Dyes, aniline	" ...		15,033		22,301
Fans of all kinds	Pieces ...	1,410,319	2,105	1,071,137	1,985
Glassware	Cwts. ...	1,183	2,983	476	1,450
Isinglass	" ...	2,192	6,633	1,846	6,749
Lamps, opium	Pieces ...	59,323	2,141	84,345	2,944
Pepper, black	Cwts. ...	4,482	11,295	4,773	14,552
Oil, kerosine, American ...	Gallons ...	53,004	1,047	23,708	679
Seaweed and agar-agar ...	Cwts. ...	23,392	15,720	26,910	21,351
Sharks' fins, white and clarified ...	" ...	250	4,015	279	5,111
Opium—					
Native, Szechuen	" ...	3,066	90,172	2,941	103,721
Yunnan	" ...	95	3,639	160	7,391
Silk—					
Raw, yellow	" ...	4,339	145,800	5,947	241,516
" wild	" ...	510	8,589	427	8,676
Cocoons	" ...	334	3,373	169	2,052
Refuse	" ...	1,316	4,425	9,844	39,971
Cocoons, refuse	" ...	11,745	49,576	497	2,623
Piece-goods and pongees ...	" ...	639	60,699	697	80,560
Ribbons, interwoven with imitation gold and silver thread	" ...	26	2,743	2,338	408
Spectacles	Pairs ...	40,684	512	27,849	311

NOTE.—Total imports, value, 1,580,284.

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CHINA.

REPORT FOR THE YEAR 1893
ON THE
TRADE OF NEWCHWANG.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1229.

*Presented to both Houses of Parliament by Command of Her Majesty,
JUNE, 1894.*

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CHINA.

NEWCHWANG.

Consul Bullock to the Earl of Rosebery.

My Lord,

Newchwang, February 14, 1894.

I HAVE the honour to forward herewith my Report on the Trade of Newchwang for the year 1893.

I have, &c.

(Signed) T. L. BULLOCK.

Report on the Trade of Newchwang for the Year 1893.

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Total Trade.

The customs returns show that Newchwang has had another good year. If silver values be taken, the total trade of the port displays an increase over any previous season. But changing these into gold, one finds that there is a trifling decrease from 1892 and a considerable one from 1891. In the last-mentioned year, however, the customs tael was the equivalent of 4s. 10½d., and in (1745)

1892 of 4s. 4½*d.*; while for 1893 I have calculated it as only worth 3s. 11½*d.* This gives a fair average value for the 12 months under review, though it is much higher than the point to which the exchange had sunk before the close of the year.

The trade of Newchwang depends principally on the bean crops. If these be good there should be a large business in exports, and in consequence plenty of money wherewith to buy imports. It was known a year ago that the bean harvest had been inferior in some localities, but the deficiency proved greater than anticipated. Fortunately, however, the demand for beans in Japan and other places, and for bean-cake in South China, proved so strong that prices were maintained at a very high level throughout the season. Consequently the export trade decreased much less in value than in bulk. The trade in native imports, which in 1892 had been unusually small, rose again to a high pitch. Foreign imports also did well, though they were far less than in 1891. In that year the trade in them was of unprecedented magnitude, and the market seems to have been clogged to some extent ever since.

Foreign Imports.

During the year under review imports of foreign origin were received to the value of 5,561,647 taels (1,100,743*l.*); while in the preceding year they came to 5,197,851 taels (1,137,030*l.*). They arrived here almost entirely via Shanghai, about one-eighth only, 670,926 taels (132,787*l.*), coming direct from foreign countries. Small as this amount is it is much larger than in the previous year, when the figures were 360,266 taels (78,808*l.*). The increase is entirely in goods received from Hong-Kong, chiefly Java brown sugar, and white sugar from Hong-Kong refineries.

Imports from
Hong-Kong.

The total imports from Hong-Kong came to 551,673 taels (109,185*l.*). Those from Japan, 82,295 taels (16,287*l.*), are a little less than before; those from the Russian Pacific coast have grown, but still remain insignificant.

Fall of silver.

I have been at some pains to endeavour to ascertain if the great fall in silver in the second half of the year had any effect upon the import trade. Comparing the quarterly returns of imports for the last two or three years, one finds that there was not any general falling off in the latter part of 1893. As a rule those articles which fared well or badly in any one quarter did the same throughout the whole of the season. But at the same time it must be remembered that just after silver began to go down, the Chinese merchants of Newchwang learnt that there was every prospect of an excellent bean crop throughout the Manchurian provinces. This latter news, as is always the case here, had a most stimulating effect on the import trade. The dealers knew that, high prices or low prices, the people would have money in their pockets and would want to make purchases with it. So it happened that the demand in Shanghai for goods to ship to

Newchwang was much brisker and stronger than it would otherwise have been. Had it been announced that the bean harvest would be a bad one, there would have been in all probability a very different state of affairs to chronicle. The expectation of a small up-country demand would in itself have determined importers to diminish the amount of their purchases; and under such conditions the rise of prices in Shanghai must have given a strong impulse to the retrograde movement.

The quantity of Indian opium arriving in the port is a little Opium. greater than last year, 21,520 lbs. against 17,413 lbs. But one cannot attribute any significance to the increase. There was no Persian opium imported this year. It is quite impossible to estimate the amount of native opium produced in Manchuria. Besides what is consumed locally a good deal leaves Newchwang in junks, or is carried overland to Tientsin. There are special offices for its taxation, but very little appears to pass through them.

The value of cotton goods for the year, exclusive of yarn, is Cotton goods. 2,009,080 taels (397,630*l.*). With the addition of yarn they come to about as much again. These figures are a little below those of last year, but compared with many other ports Newchwang is considered to have done extremely well. For a part of the summer and autumn Shanghai market reports spoke our port as the only one for which there was anything that could be called a demand.

Grey shirtings occupy a less important place at Newchwang Shirtings. than in the southern ports where light materials are more required. They have done a little better than last year, 51,272 pieces against 43,965 pieces, but they are still a long way below what they were in previous seasons. The import of other kinds of shirtings, white, dyed, figured, &c., has been somewhat smaller than in 1892.

T-cloths continue to be out of favour. They have fallen from T-cloths. 30,350 pieces to 25,923 pieces. Between the heavier foreign cottons on the one side and home-made goods woven from imported yarn on the other, there seems to be no room left for them at all.

Drills and sheetings take the chief place among cotton goods Drills and sheetings. in the Newchwang trade. The import of the former is above 200,000 pieces, and of the latter considerably more than 300,000 pieces. Drills have done better than last year by about 30,000 pieces, but sheetings have fallen off nearly three times as much. The most remarkable fact concerning the trade in these two articles is the extraordinary diminution in the amount received from the United States. For several years American drills and sheetings had been arriving at Newchwang in steadily-increasing quantities, till they had not merely distanced all competitors, but had even amounted to nine-tenths of the whole. In the present year, however, while United States drills have fallen from 153,485 pieces to 100,785 pieces, and United States sheetings from 369,770 pieces to 251,750 pieces, English drills and sheetings on the contrary have risen from 18,845 pieces to 80,110 pieces, and from 41,150 pieces to 71,110 pieces respectively. This important alteration cannot be in any way ascribed to the preference of

purchasers, or any other local causes. It is due to the shortness and dearness of the supply which has reached Shanghai from the United States. I am, of course, not in a position to predict whether a similar state of affairs will prevail in future seasons as well. It should also be noticed that 20,665 pieces of Dutch drills appear in the returns, against none in the two previous years, and that Indian sheetings have risen from 14,870 pieces in 1892 to 18,035 pieces this season.

Other cottons. Among other cotton goods the most marked improvement is in printed twills, which have risen from 936 pieces to 6,535 pieces, in cotton lastings, and in handkerchiefs and towels. Velvets fared better than in the preceding year, velveteens rather worse.

Yarn. The import of English yarn has again declined. The year's import is 24,000 lbs., which is less than a tenth of what it was only a few years ago. The import of Indian yarn exceeds 14,000,000 lbs. This is a trifle less than in 1892, and a good deal less than in 1891, but it is more than in any earlier year. There was a considerable drop in the import just at the close of the season. But this does not appear to portend anything, as there was an unusually large quantity shipped here in the months of July, August, and September. Taking the two last quarters together, the entry is almost as large as in the same portion of the preceding year. At the same time much more raw cotton than usual arrived during the season, and especially in the latter half. The falling-off in yarn combined with the large purchases of cotton, was thought by some persons to signify an intention on the part of the people of Manchuria to resort more to spinning at home on account of the heightened price of Indian yarn. But it appears improbable that such should be the case. For one can hardly imagine so extremely sudden a reversion to old practices by the cottagers scattered through the distant interior, who, indeed, could not have been aware so soon that anything had occurred to make yarn dearer. Also, in 1891 and 1892, the first two years of the greatly-increased introduction of yarn into Newchwang, the shipments of raw cotton grew *pari passu*, showing that the one article was not merely superseding the other. In 1892 the raw cotton entering the port was much less than usual, and the local crop was small as well. This year's increased import is, therefore, doubtless merely compensating for the deficiency of that season.

Woollens. Woollens were imported to the value of 48,796*l.*, against 49,334*l.* in the preceding year. The principal item in the list is lastings, which in value were just one-third of the whole. Next, one is surprised to notice, comes Italian cloth, to the value of 11,139*l.* No article showed any very striking increase or diminution.

Metals. Metals did badly, the total import being valued at 62,308*l.*, while for 1892 the figures were 73,364*l.* The falling-off was entirely in the different classes of iron, and particularly in old iron, which is the kind most largely used. Other metals did better than before, but the trade in them is always insignificant. It should be noticed that the short import occurred as much in the first as in the second half of the year.

Among foreign "sundries" the leading place is taken by brown ^{Sundries.} sugar coming from Java viâ Hong-Kong, which, compared with ^{Sugar.} the figures for 1892, is found to have mounted from less than 1,000,000 lbs. to over 7,500,000 lbs. White sugar also did extremely well. The shipments of it to Newchwang in 1892 amounted to 519,467 lbs., in 1893 to 2,404,694 lbs. This article is the product of the Hong-Kong Sugar Refineries. It is said to be highly appreciated by the Chinese in the interior, who recognise its superiority over the Chinese white sugar from Swatow. Taking foreign and native sugars together, the year's import is well above the average, though it is a good deal less than what has been seen in occasional seasons.

Next in value to sugar comes kerosene oil, the returns for ^{Kerosene.} which are the highest recorded. American oil increased from 254,000 gallons in 1892 to 465,160 gallons in 1893. Russian kerosene, which in 1892 had been "under a cloud," rose from 1,000 gallons to 105,300 gallons. American oil, however, is still very generally preferred.

Native Imports.

The trade in native imports came to 2,807,355 taels (555,602*l.*). This is an improvement on the year before to the extent of nearly 25 per cent., and is but little behind 1891, which was the best year known. The principal articles are raw cotton, sugar, silk, piece-goods, and tobacco. The improvement was chiefly due to the wonderful increase in the quantity of raw cotton received, upon which I have touched under the head of yarn.

Exports.

The native produce exported during the year under review was valued at 9,329,996 taels (1,846,562*l.*). In 1892 the figures were 9,113,856 taels (1,993,656*l.*).

The export of beans and bean-cake was considerably less in ^{Beans and} quantity than in 1892, the figures for beans being 445,310,146 lbs. ^{bean-cake.} against 555,998,400 lbs., and for bean-cake 310,295,314 lbs. against 375,840,533 lbs. There was, however, a strong demand for both of these throughout the season, and the supply not being sufficient, prices were maintained at a high level. Thus, in 1892, taking the whole year together, beans cost about 1.05 taels per picul, and bean-cake about 0.75 taels, while in 1893 the season opened with beans at 1.20 taels, and bean-cake at 0.95 taels; and the average rates for the whole year were 1.30 taels and 1 tael. The harvest for 1893 was an extremely good one, and large supplies were expected to arrive in the autumn months. They, however, did not come in so freely as was expected. Indeed, the quantity received during the autumn was less than it had been after the certainly inferior harvest of 1892. This, I understand,

was owing to the fact that a very large number of boats were caught up country in the ice, a sudden frost having occurred as they were coming down near the end of the season. In consequence more than one vessel, which had been chartered to load here shortly before the river closed, was obliged to go away without a cargo. The trade with Japan in beans has continued to grow. In my last report I mentioned that the exports to that country, principally beans, had grown in a few years from 5,000*l.* or 6,000*l.* to over 200,000*l.* This year they are well above 300,000*l.* It is said that this trade will be smaller in the coming season because Japan is able to draw supplies from Corea, where the prohibition put in force last year against the export of pulse has recently been removed.

Wild silk.

Raw wild silk is the only other export which reaches a value of 100,000*l.* The export this year was 608,633 lbs., while it was 795,390 lbs. in the preceding one. As a good deal of silk, in quantities which vary much in different years, leaves Manchuria by Port Arthur and other small ports, without coming to Newchwang, it is impossible to estimate how far the drop is due to decreased production, and how far merely to change of route.

Treasure.

The movement of precious metals at Newchwang is not of such a character as to be of general interest, except that gold bars to the value of 279,769*l.* were exported from here to Shanghai. This gold is the result of mining in the interior, and so might fairly be classed among the commercial exports of the district. It does not represent the whole production of Manchuria, as, besides what may be carried by officials to Peking, a considerable quantity is known to be taken by merchants overland to Tientsin. Silver bullion to the value of nearly 400,000*l.* was imported into Newchwang, principally from Shanghai, while the export of silver was only 186,601 taels (36,931*l.*). Dollars are in little use here.

Shipping.

With a decreased export of beans and bean-cake it was inevitable that there should be a falling-off in tonnage. There entered the port 397 vessels of 29,654 tons against 428 vessels of 331,832 tons in 1892. The number of vessels, however, is much larger than in any year previous to 1891. Sailing vessels are steadily going out of use. 20 years ago between 200 and 300 would arrive in the course of the season. The year 1886 was the first in which their number fell below 100. This year it was under 50.

British
shipping.

Rather more than half the tonnage was British, though not quite half the number of vessels. British craft, sailing ships and steamers together, decreased in number from 194 to 182, and in

tonnage from 164,439 tons to 153,487 tons. The German was the only flag which had more vessels entering the port than in 1892, namely 119 against 116. Nevertheless the German tonnage decreased from 83,411 tons to 74,445 tons, which is proportionately a greater falling-off than that of the British vessels. The numerical increase of the German vessels is not difficult to explain. There are three great shipping companies, two English and one Chinese, which enjoy the lion's share of the carrying trade on the coast of China. In 1892 these companies were engaged in a violent competition, which brought down freights to a rate that could be profitable to no one. There was, therefore, very little opening for the small "outside" steamers, the majority of which are German. In 1893 the great companies made arrangements with each other and freights consequently were higher. This gave a chance to the outsiders, of which they naturally availed themselves.

Freights varied greatly during the course of the year. The season opened with charters at 22 dol. cents per picul for vessels to the South China ports. In the middle of the year the rate fell as low as 14 c. But before the end it had risen to 30 c., and at the last moment, available tonnage being insufficient to meet the estimated requirements, one or two vessels were chartered at even 35 c. The season is believed to have been fairly profitable to the shipping companies. Freights.

Miscellaneous.

There is every prospect that 1894 will be a good year for Newchwang. I have described above how there was an unusually large bean crop last autumn, and the export was hindered by an unexpected accident. If, therefore, the demand keeps up, there should be an immense export trade and large employment of tonnage in the course of the coming year. And, as the import market is not by any means glutted with old stocks, one may fairly expect that the profits of the bean trade will be largely expended in the purchase of imports. It is unfortunate that the unusual mildness in the early part of the winter, which kept the roads soft, and later on heavy snowfalls up country have greatly hindered communication with the more distant parts of the interior, so that less goods have been sent inland and larger stocks remain in Newchwang than would otherwise have been the case. But very probably trade will not suffer in the long run for this momentary drag on its wheel. Prospects for 1894.

Looking beyond the immediate year in front of us, one sees that the future of Manchurian trade is bound up in the progress of the railway. In the two northern provinces there are countless acres only waiting for hands to till them, and for a cheap means of conveying their produce to the coast. There is already a considerable population in the three provinces together, 20,000,000 on a very moderate computation; and many more are ready to join them from Shantung just across the gulf. The railway thus will Railways.

not merely aid in bringing down produce, but will carry settlers to the lands where they are wanted.

The programme of the railway, I am informed, is as follows:— Last summer the line from Tientsin was carried to a point just inside the Great Wall, and trains now run so far. The engineers are at present occupied with the section, about 100 miles long, between the Great Wall and Chin-chou Fu, an important city on the coast, some distance to the west of Newchwang. This is the most difficult portion along the whole line, and will take 2 years to complete. As soon as it is finished, an extension will be made from Chin-chou to some place near Moukden, and simultaneously a branch line will be constructed between the Moukden neighbourhood and the port of Newchwang. After the completion of these, the next step will be to take the line on from Moukden to Kirin via Kuanchengtzu, the most important inland mart in Manchuria.

The annual sum devoted by the Imperial Government to the construction of the line is 2,000,000 taels (400,000*l.*).

I must close this report by recording my obligation to Mr. T. F. Hughes, Commissioner of Customs at Newchwang, for his kindness in allowing me access to the returns of trade compiled in his office.

Annex 1.—RETURN of Principal Imports at Newchwang during the Years 1893–92.

Articles.			1893.		1892.	
			Quantity.	Value.	Quantity.	Value.
FOREIGN IMPORTS.						
				£		£
Opium, Indian	Lbs. ...	...	21,520	13,784	17,413	12,176
Cotton goods—						
Shirtings—						
Grey	Pieces ...	...	51,272	19,523	43,965	19,187
White	" ...	...	22,622	9,008	29,095	10,656
Dyed	" ...	...	3,559	1,773	7,753	6,737
Figured, &c.	" ...	...	1,955	1,182	4,943	3,594
T-cloths	" ...	...	25,923	6,561	30,350	7,373
Drills—						
English	" ...	...	80,110	44,314	18,845	9,975
Dutch	" ...	...	20,665	11,019	...	...
American	" ...	...	100,786	59,899	163,485	87,720
Jeans, English	" ...	...	1,940	784	2,980	1,391
Sheetings—						
English	" ...	...	71,110	38,754	41,150	20,325
American	" ...	...	251,750	152,492	369,770	214,417
Indian	" ...	...	18,035	8,161	14,870	6,506
Chintzes and furnitures	" ...	...	7,621	2,209	7,584	2,329
Printed twills	" ...	...	6,535	2,328	936	519
Turkey reds	" ...	...	6,835	4,084	4,352	2,363
Cotton lastings	" ...	...	30,265	15,231	21,358	12,664
Velvets	" ...	...	1,419	2,528	518	843
Velveteens	" ...	...	2,982	8,525	4,356	16,955
Handkerchiefs and towels	Dozens ...	...	109,681	5,246	62,093	5,895
Yarn—						
English	Lbs. ...	...	24,000	855	32,400	1,231
Indian	" ...	...	14,731,200	386,550	14,959,133	434,436
Woolens—						
Camlets, English	Pieces ...	...	1,280	3,024	1,040	2,314
Lastings	" ...	...	9,050	16,337	11,418	22,479
Long Ellis	" ...	...	3,985	5,250	3,970	4,137
Spanish stripes	" ...	...	996	1,230	737	1,205
Cloth, Russian	" ...	...	1,150	8,438	1,180	7,437
Italian cloth	" ...	...	9,403	11,139	8,757	10,083
Metals—						
Iron—						
Nail rod	Lbs. ...	...	2,787,634	10,093	3,595,896	12,494
Bar	" ...	...	385,078	1,330	1,191,067	3,905
Old	" ...	...	13,092,769	23,460	17,649,091	33,151
Tin, in slabs	" ...	...	117,793	4,462	66,175	2,575
Lead, in pigs	" ...	...	699,840	5,084	716,995	3,906
Steel	" ...	...	432,440	2,868	345,957	2,068
White metal	" ...	...	137,559	6,373	74,852	4,565
Sundries—						
Brass buttons	Gross ...	...	49,965	3,610	34,950	6,262
Dyes, aniline	Value ...	...	...	14,574	...	14,324
Glass, window	Boxes ...	...	5,854	2,818	2,738	1,498
Matches	Gross ...	...	125,327	14,610	95,361	14,804
Needles	Mille ...	...	175,450	4,086	161,500	4,009
Oil, kerosene—						
American	Gallons ...	...	465,160	8,832	254,000	3,993
Russian	" ...	...	105,300	1,992	1,000	19
Pepper, black	Lbs. ...	...	305,441	3,651	374,501	4,816
Seaweed—						
Japan	" ...	...	816,016	2,533	672,334	7,156
Russian	" ...	...	4,918,028	7,095	1,627,840	979
Furs—						
Fox skins	Pieces ...	...	14,193	2,260	21,836	3,412
Martens	" ...	...	5,242	3,631	10,685	9,934
Sugar—						
Brown	Lbs. ...	...	7,537,302	47,763	900,077	4,430
White	" ...	...	2,404,694	20,868	519,467	4,261
NATIVE IMPORTS.						
Cotton, raw	Lbs. ...	...	11,219,008	198,158	4,853,500	81,838
Sugar—						
Brown	" ...	...	8,327,402	54,017	9,334,266	45,942
White	" ...	...	2,033,614	15,516	1,680,533	13,819
Candy	" ...	...	911,862	8,402	1,049,467	9,918
Silk piece-goods	" ...	...	133,980	74,457	184,284	120,609
Tobacco, prepared... ..	" ...	...	1,588,524	17,979	1,324,300	26,003

Annex 2.—RETURN of Principal Exports from Newchwang during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Bean-cake	Lbs. ...	310,295,314	460,595	375,840,533	472,507
Beans	" ...	445,310,146	869,378	555,998,400	861,068
Bean-oil	" ...	11,878,072	68,353	16,128,133	87,453
Deer horns, young	Pair ...	1,667	28,561	2,024	90,568
Ginseng—					
Native	Lbs. ...	126,109	39,328	96,854	29,245
Corean	" ...	32,542	96,619	28,267	92,797
Silk—					
Raw, wild	" ...	608,633	100,939	795,390	152,378
Refuse	" ...	414,284	20,040	339,282	16,699
Skin rugs—					
Dog	Pieces ...	56,403	21,787	66,299	36,381
Goat	" ...	84,609	15,779	105,943	22,600

NOTE.—In the above tables customs taels have been changed into sterling at the rate of 3s. 11½d. for 1893, and 4s. 4½d. for 1892.

Annex 3.—RETURN of Vessels, Foreign-Owned, or of Foreign Type, which have entered the Port of Newchwang during the Year 1893.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	24	11,063	158	142,424	182	153,487
German	12	4,560	107	69,795	119	74,445
Chinese	...	...	56	40,095	56	40,095
Japanese	...	...	23	18,409	23	18,409
Swedish and Norwegian	2	770	12	7,348	14	8,118
Other nations	...	...	3	2,100	3	2,100
Total	38	16,483	359	280,171	397	296,654
„ for the year preceding	51	22,090	377	309,742	428	331,832

NOTE.—The clearances for 1893 were exactly the same as the entries.

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AND FINANCE.

CHINA.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF WĒNCHOW.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1212.

*Presented to both Houses of Parliament by Command of Her Majesty,
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1330. St. Petersburg	2½d.	1390. New Orleans	2½d.
1331. Patras	1½d.	1391. Manila	2d.
1332. Calais	2½d.	1392. Foochow	1d.
1333. Loanda	1d.	1393. Ningpo	1d.
1334. Bordeaux	2½d.	1394. Chinkiang	1d.
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1336. Galveston	8½d.	1396. Chungking	1½d.
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1341. Havre	2½d.	1401. Tainan	1d.
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CHINA.

WENCHOW.

Consul Mansfield to the Earl of Rosebery.

My Lord,

Wenchow, February 24, 1894.

I HAVE the honour to enclose a Report on the Trade of Wenchow for the year 1893.

I have, &c.

(Signed) R. W. MANSFIELD.

Report on the Trade of Wenchow for the Year 1893.

ABSTRACT of Contents.

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Shipping.

It is satisfactory to note, after an interval of 3 years, the re-
appearance here of the British flag. In April a small steamer, ^{New British steamers.}
the "Pekin," 118 tons, began to ply between Hong-Kong, Amoy,
Foochow, and Wenchow, making the round trip in about 18 days.
The results have been so satisfactory that the owners have pur-
chased a second vessel, a few tons larger, for the same trade, and
she will begin to ply in March or April of the current year. There
is talk of her going further north to Ningpo and Shanghai, but the
China Merchants' Company, who have the monopoly of the ^{Monopoly of}
northern trade, will doubtless use every means to make such an ^{northern}
attempt unprofitable. It is much to be regretted that there should ^{trade.}

not be a little healthy competition for the carrying trade to Shanghai. The present freight is 5 dol. per ton, and rather than accept lower, though very reasonably remunerative freights, the company's ships will leave with little or no cargo.

In spite of this the profits must be very large, as the value of the cargoes carried by a small steamer, running every 10 days during 1893, amounted, roughly speaking, to 170,000*l.*, while the passenger traffic is an important addition. The development of trade, which a reduction of freights would inevitably produce, should afford ample scope for another vessel. The difficulty appears to be in the fact that the other great coast carrying companies, the Indo-China and China Navigation, are bound by an agreement which probably prevents their entering the lists, while smaller companies are deterred by the competition with a rich and powerful association which a first attempt would call forth.

Imports.

Opium.	The importation of foreign opium, which rapidly declined since 1888, has again increased by nearly 2,000 lbs. Little is consumed in the port itself, as the native drug of good quality is produced in the immediate neighbourhood, and the extreme poverty of the inhabitants precludes the more costly luxury.
Cotton piece-goods.	The inevitable result of the decline in silver is seen in the falling-off in cotton piece-goods of a value of some 4,000 <i>l.</i>
Woollens.	Woollens have remained stationary as far as quantity is concerned.
Metals.	Metals, of which by far the principal item is iron wire, old and new, have also declined, but not appreciably, when the lower exchange is taken into consideration.
Matches.	An increase of some 50 per cent. has taken place in matches, the Japanese article having carried the day over that made in Shanghai.
Kerosene oil.	Kerosene oil here, as elsewhere, has largely advanced, the increase being principally in American.
Lamps.	The lamps used are of the very cheapest and coarsest German manufacture, the cost, as shown by the customs returns, averaging 6½ <i>d.</i> each.
Sugar.	Sugar, probably from Hong-Kong, has trebled itself, and most
Sundries.	sundries show a fair increase.
Total import.	The total value of imports is 114,641 <i>l.</i> , against 112,560 <i>l.</i> in 1892, a satisfactory improvement when the falling-off in piece-goods and the lower rate of exchange are taken into consideration.

Exports.

Tea.	Tea continues to be by far the largest article of export in the year under review, making up 66 per cent. of the whole. The amount was 1,500,000 <i>l.</i> , against little over 1,000,000 <i>l.</i> in the
------	---

previous year. More than half was, as hitherto, exported in an unprepared state to Shanghai and Hankow, but a new departure has been made by importing boxes and packing lead, and exporting tea ready for the foreign market. Some tea was also sent to Amoy to be mixed with Formosa Oolong for the New York market. The experiment was not, however, a success, as the experts on the other side did not approve of the mixture.

It would seem worthy the attention of some foreign firm as to whether it is not worth its while to establish a branch at this port. The tea districts are close at hand, and it seems obvious that the dealers would prefer to sell their wares on the spot instead of being kept out of their capital until the tea is sold in other markets. The heavy coast freights would also be avoided. In former years the amounts shipped have been too small to encourage foreigners to settle here, but the present respectable figures, with the prospect of largely increasing business, should offer sufficient inducement. The teas are of good quality, and if it be worth the while of the dealers to send their goods to Hankow for exportation, purchases on the spot should show a good margin of profit. The trade being entirely in Chinese hands, it is difficult to obtain information about it beyond the figures given by the customs, but it seems clear that there is, even now, a good opening for at least one British merchant.

It must be remembered that the tea which passes through the Maritime Customs is only a fraction of the total tea trade. My predecessor estimates that the junk-borne export amounts to some 6,000,000*l.*, mostly or all of the commoner sorts and "unfired."

White alum from the mines of Pingyang has reappeared on the Alum. list of exports for the first time since 1885, and a shipment of pigs Pigs. has also been made.

Charcoal, firewood, and fresh oranges are all plentiful and cheap, but for such bulky articles existing freights are prohibitive. Soapstone ornaments, the making of which is described in the report for 1892, may possibly become an important item, though little known at present.

The total exports amount to 62,554*l.*, against 39,924*l.* in 1892, and 40,401*l.* in 1891. This increase of the sterling value is, in spite of the lower exchange, here calculated at 4*s.* to the Haikwan tael, while it was 4*s.* 4*d.* and 4*s.* 11*d.* in 1892 and 1891 respectively.

General Remarks.

The total trade of Wênchow for 1893 in foreign bottoms was 181,681*l.*, an increase of nearly 30,000*l.* over the previous year. Although a general improvement is apparent, the chief gain has been in the export of tea and the import of kerosene oil.

The chief obstacles in the way of still further expansion are the want of capital and consequent absence of the system of even short credit prevailing elsewhere. The population is poor, as is proved by the lowness of wages, the ordinary day labourer only

earning 130 cash, about 3*d.* per diem. His wants are, therefore, of the simplest, and here comes in the disadvantage of the monopoly of sea carriage held by the China Merchants' Company, and exorbitant freights; for the cheap and bulky cargo, which would meet the requirements of the lower classes, is unable to pay these freights, and recourse has to be had to local products. These obstacles would be removed by the establishment here of a respectable general merchant, whose ships would call as occasion required. The tea trade alone should be sufficient inducement, for, heavily handicapped as it is under the present system, it has continued to expand, and it is estimated that tea can be placed on the Wênchow market at at least 2 dol. a picul less than on that of Foochow. The cheapness of labour here should also render the firing and packing less expensive. It is astonishing that no attempt has been made on the part of foreign merchants since 1878 to develop the trade of the port, which was only opened in 1877. The outlook, then, was doubtless discouraging, as the export of tea in foreign bottoms for 1878 was only 90,000 lbs. It has now risen to 1,500,000 lbs., and this entirely without the stimulus of foreign capital and intelligence. Surely there is here a field for enterprise which it would be foolish to neglect. The population of Wênchow, formerly a flourishing port but ruined by the Taip'ing rebellion, is poor, but there are other marts for imports within easy reach now fed from Ningpo, a much more distant port. I, and I am sure my successors, will be most happy to supply information to British merchants who may contemplate adopting my suggestion, and to afford every possible facility and assistance to any who may visit the port with a view of judging for themselves. I may add that land is exceedingly cheap, and the cost of living less than in any port I have known.

The advent of the small British steamer alluded to in my remarks on shipping has caused the opening of an agency by a Spanish merchant of Amoy, but so far its business has been confined to finding freight for the steamer.

In conclusion, I must express my regret at the meagreness of this report, reliable information being difficult to obtain in the absence of foreign merchants. My remarks have, therefore, been chiefly based on the customs figures, for access to which before publication I am indebted to the courtesy of M. Novion, Commissioner of Customs.

Annex A.—RETURN of Principal Articles of Export from Wên-chow during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Alum, white	Lbs.	124,691	£ 429	...	£ ...
Bamboo shoots	"	33,172	106	79,159	152
Charcoal	"	919,188	557	838,504	545
Coir	"	304,657	1,645	245,320	1,388
Firewood	"	771,080	143	488,800	143
Fish maws	"	15,012	1,590	17,469	1,266
Isinglass	"	3,995	313	2,101	135
Medicines	"	...	2,103	...	2,617
Oranges, fresh	Lbs.	2,075,559	3,658	1,481,013	2,325
Pewterware	"	2,345	119	2,927	157
Pigs	Pieces	214	128	...	...
Prawns, dried	Lbs.	55,907	1,680	51,137	1,586
Resin	"	72,909	109	95,540	155
Silk piece-goods	"	499	351	406	211
Soapstone ornaments	"	38,519	464	23,716	308
Tea—					
Black	"	530,157	15,551	401,201	12,136
Green	"	149,518	5,778	...	...
Unfired	"	851,491	13,869	624,227	11,757
Tobacco leaf	"	161,797	1,268	161,003	1,135
Umbrellas, paper	Pieces	210,570	3,369	125,210	1,402
Wood, poles	"	28,902	1,159	18,712	1,144
Sundries	"	...	3,165	...	1,811
Total	...	...	62,554	...	40,401

Exchange: Haikwan tael = 4s.

Annex B.—RETURN of Principal Articles of Import into Wên-chow during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Opium	Lbs.	18,619	£ 12,519	16,773	£ 12,298
Cotton goods—					
Grey shirtings	Pieces	28,878	10,991	37,566	12,275
White	"	6,961	4,168	8,881	4,698
T-cloths	"	25,743	8,825	35,271	9,638
Sundry	"	...	3,810	...	3,991
Yarn	Lbs.	35,600	1,211	61,466	1,975
Woollens	Pieces	5,434	10,147	5,421	8,697
Metals	Lbs.	1,664,000	7,199	1,834,900	8,246
Llama braid	Boxes	17,727	1,078	14,970	1,100
Aniline dyes	"	...	1,488	...	1,420
Ginseng (foreign)	Lbs.	5,852	2,732	3,956	1,628
Matches—					
Japanese	Gross	48,000	2,126	14,250	709
Shanghai	"	11,100	445	16,000	693
Kerosene oil—					
American	Gallons	385,500	9,553	207,400	5,986
Russian	"	210,500	4,660	187,400	4,908
Seaweed (Japanese)	Lbs.	765,900	3,329	730,133	3,263
Sugar	"	476,800	3,952	177,400	1,344
Beans	"	201,129	1,062	138,000	720
Pungus	"	114,487	3,409	63,600	2,793
Hemp	"	154,860	1,918	107,750	1,369
Lily flowers...	"	191,007	2,033	151,300	1,816
Medicines	"	...	1,164	...	1,779
Varnish	Lbs.	21,605	1,982	22,989	2,480
Wax, white...	"	9,705	1,200	9,648	822
Sundries	"	...	13,640	...	17,912
Total	...	...	114,641	...	112,560

Annex C.—TABLE showing Total Value of all Articles Exported from and Imported to Wênchow from and to Foreign Countries during the Years 1892–93.

Country.	Exports.		Imports.	
	1892.	1893.	1892.	1893.
Hong-Kong	£ ..	£ 290	£ ..	£ 4,496

Annex D.—RETURN of all Shipping at the Port of Wênchow during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	12	1,416	12	1,416
Chinese	5	802	38	21,131	43	21,933
Total	5	802	50	22,547	55	23,349
„ for the year preceding ...	9	1,633	36	10,826	45	12,459

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	12	1,416	12	1,416
Chinese	6	1,013	38	21,131	44	22,144
Total	6	1,013	50	22,547	56	23,560
„ for the year preceding ...	8	1,422	36	10,826	44	12,248

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DIPLOMATIC AND CONSULAR REPORTS ON TRADE
AND FINANCE.

CHINA.

REPORT FOR THE YEAR 1893
ON THE
TRADE OF PAKHOI.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1197.

*Presented to both Houses of Parliament by Command of Her Majesty,
JUNE, 1894.*

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CHINA.

PAKHOL.

Consul Fraser to the Earl of Kimberley.

My Lord, Pakhoi, March 22, 1894.
 I HAVE the honour to enclose my Trade Report for the year
 1893, with the usual Annexes on Shipping, Imports, and Exports.
 I have, &c.
 (Signed) M. F. A. FRASER.

Report on the Trade and Commerce of Pakhoi for the Year 1893.

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Fall in
exchange.

In the accompanying tables, extracted from returns courteously placed at my disposal by the commissioner of customs, all tael values, both for 1892 and 1893, have been converted into sterling at 3s. 10d. per tael. The tael had this average value during 1893, and the Mexican dollar was worth 2s. 6 $\frac{3}{16}$ d. according to information kindly given to me by the bank. This difference in rates, which had to be taken into account in order to ensure a fair comparative statement, explains the discrepancy between the sterling figures in last year's trade report and this year's.

Imports.

Cotton goods

In the imports I have to notice, with the usual decrease in opium, a falling-off in cotton goods, and on the other hand an increase in woollens, kerosene oil, both American and Russian, Japanese matches, American flour, llama braid, aniline dyes, and lamps, the last three items being principally from Germany. Owing to the scarcity caused by the floods in spring, an exceptionally large quantity of rice had to be imported, in fact the largest on record. Almost all of this came from French Indo-China, most of it by way of Hong-Kong. The necessity of spending so much money in buying the staple food must have been a main cause of the smallness of European imports.

The total import trade must be considered unsatisfactory, as it will be seen that the import of manufactured cottons fell off nearly 11,000l. from the previous year's value. Indian yarn still forms an enormous percentage of the foreign goods; although, instead of increasing, it has fallen to below the figures of the year 1888, still if we exclude the accidental or abnormal rice import of

1893, from the imports specified in our list (Annex B) we find that more than half the total value is obtained from the large import of cotton yarn from India.

With respect to the articles lumped together as "other foreign goods," which deceptively appear to restore the balance, their apparent increase is due to the fact that previously goods of native origin were called in the customs returns "native goods," but in the returns for 1893 they were called "foreign goods," because shipped from Hong-Kong, a non-Chinese port. The increase in the import of other "foreign goods" only outweighs the falling-off in native goods, due to the above cause, by some 9,000*l.*; and had it not been for the exceptional import of rice ^{Abnormal} which I have referred to, the total of imports, instead of showing ^{rice import.} a slight advance, would have exhibited a marked decrease.

Exports.

The exports (which all went to Hong-Kong except about 400*l.* worth to Hoi-How, Island of Hainan) show, compared with last year, a falling-off in indigo, aniseed oil, cassia oil, star aniseed, and sugar, and an increase in hides and horns, raw white silk, tobacco leaf, and native medicines, which goes but little way towards righting the balance (see Annex C). But if we go further back and take the last 10 years' average into account, our export list does not present such an unsatisfactory aspect as Annex C, considered by itself, would indicate.

The total volume of trade for 1893, taking imports and ex- ^{Total trade.} ports together, was only a little below the average of over 4,380,000 taels which it had maintained in the previous 6 years beginning in 1887, when it took a vigorous leap forward.

The likin-tax on live pigs was raised to 20 c. a head, hence ^{Various} the number exported shows a large diminution. ^{Exports.} Independently of taxation, Pakhoi, from its greater distance from Hong-Kong, ^{Pigs.} cannot compete with Hoi-How, in Hainan, in this trade. A larger number of the hogs must die on a longer voyage.

This export has attained prominence, 3,000 more having been ^{Hides.} exported than in 1887, the best previous year. Ox-hides usually cost about 6 taels a tan (pecul or load, supposed to weigh 133½ lbs.); buffalo hides about 5 taels. They came mainly from K'in-Chow, a flourishing port to the west (marked on some maps as Yam-Tiao, following the local pronunciation). In 1893 the Nanning ^{cattle.} rise in price brought hides from as far as Nanning, a great town to the north-west, to which I shall refer later on in this report. Amongst its many important industries, Nanning is renowned for its manufacture of buffalo skin trunks, varnished, costing from 5 dol. to 8 dol. each, and much esteemed in China. Nanning's butchers supply its neighbourhood with beef, and at each fair it is said that 1,000 head of cattle are sold.

Liquid indigo came down principally from Yüh-Lin-Chow ^{Indigo.} (locally called Wät-Läm-Chow), in Kwangsi. Plantations of it (1758)

are found all along the course of the great West River. The severe winter of 1892-93 destroyed many plants. The production was small, and the export shows a marked decrease.

An seed.

Of star aniseed the export was smaller than in 1892, but compared favourably with that of any former years since 1885. The star aniseed (which in Tonkin is called by the French "Badiane") grows chiefly in the north-west of Kwangsi, in the vicinity of Po-Sé; at Lung-Chow, a port opened to French trade, about 100 miles south of Po-Sé, there is an inferior sort, some of which is shipped from Pakhoi by steamer.

Ground-nut oil.

The falling-off in ground-nut oil is said, strange to say, to be owing, in whole or in part, to the smallness of demand from California, whither it is shipped from Hong-Kong for Chinese use. The oil is used for burning in lamps, for culinary purposes, and for making perfumes.

Cassia oil.

Of cassia-leaf oil only a very small quantity was exported, and cassia has not figured in the list since 1888.

Aniseed oil.

Of aniseed oil a great deal more was exported than in any former year except 1892.

Agricultural products.
Ground-nut.

It will be observed that ground-nut cake and ground-nut oil are two of the local products most largely exported in steamers, and this is equally true of junks. The ground-nut (arachis) is grown in the plains generally along the course of the great Canton River (the West River), all the way from Wu-Chow to Lung-Chow. A great deal is grown about Pakhoi. The cake is used, like the bean-cake of North China, as manure, and the oil for burning in lamps and for culinary purposes. The oil is said to be shipped from Hong-Kong to California for the use of the Chinese there. The stalks make excellent fodder for cattle and horses.

Rushes.

The rushes exported are much used for borders for mattings of split bamboo, to prevent fraying and for other purposes. They are strong and flexible.

The peninsula on which Pakhoi stands presents the spectacle, rare for South China, of an extensive prairie, in which the few rice-fields still occupy a very insignificant position, although they are extending with the growth of population, and abundance of water is obtained wherever a well is sunk. There are already many of these wells each with its simple and ingenious lever for raising the water, looking like the mast and yard of a lateen-rigged sailing boat. The chief things grown seem to be ground-nuts and sweet potatoes, but the main feature is rather meagre pasture land. This eked out in winter with such things as ground-nut stalks, sugar-canes, &c., supports the many cattle, buffaloes, and small humped oxen used in agriculture, and in tracking the light bullock carts which are met in the cool season, in caravans of a dozen or a score at a time. The hides and horns, however, which figure as the most valuable export after aniseed oil, come mostly from K'in-Chow, Nanning, &c. The quantity exported in steamers from Pakhoi in 1893 was about 180 tons more than in 1887, the largest previous year since the opening of the port to foreign trade in 1877.

It is an orthodox economical doctrine in China, for the agriculturist, that the man must plough the rice-fields, and the woman must rear silkworms and weave cloth, or starve. The officials sometimes take laudable pains in extending sericulture, for instance, in Kwangsi province in 1891, and, at the date of this report, in this district. But it would probably be easy for people less opposed to novelties than the Chinese, to grow many other things in the neighbourhood, screened by the existing bamboos and pine-woods from the violent winds which make such protection necessary.

The ricinus, or castor-oil plant, grows all about here and in South China as a wild weed. In Tonkin, when exploited, it is said to be almost at once remunerative. Areca and cocoanut palms and coffee would probably do well. In the same latitude and climate a little west, in the French territory, the traveller steaming up the Red River to Hanoi admires an interminable panorama of arecas raising their elegant crests above the bananas; and near Ta-Kow and Tainan, in Formosa, are flourishing plantations of this tree. The cocoanut grows abundantly in Hainan, quite close. Coffee grows well in Tonkin, at least as far north, and in the little Island of Gweichow, only 30 miles south of Pakhoi, it thrives in the grounds of the Catholic Fathers of the Missions Étrangères. Of this, last, however, it must be said that it has not yet found its way to favour with the Chinese as an article of food.

A curious article of export is dried lizards. The European, scampering over the Pakhoi plain on a little native pony, finds his equestrian pastime sadly marred by the necessity for a bright lookout for the holes dug by the natives, sometimes on the very paths, to catch lizards. The numerical importance of these little saurians in the list of exports may well cause surprise. The greater quantity exported comes from the neighbourhood of Wuchow, in Kwangsi, a place to which I shall refer further on, they are used for making medicine called "lizard wine," it is said to be a tonic, and also to cure eye diseases. "To these persons," says the distinguished American, Dr. Wells Williams, speaking of Chinese physicians, "nothing comes amiss, and, like the ingredients of the hubbling, bubbling cauldron of Macbeth's witches, the stranger it is, the more potent they think a dose will be. Petrifications of crabs and orthoceras, bezoar of cows, scales of pangolins, horns of rhinoceroses, paws of bears, tigers bones, and other such like things, are sought after as medicines, and large sums paid for them."

Independently of lizards, however, there is, as appears from Annex C, a large import and export of native medicines, both in steamers and in junks, here as elsewhere in China, and amongst many valueless articles there must be some and even many good ones. It is much more in surgery than in medicine that the European doctor surpasses the Chinese, who have a respectable array of learned, though lamentably out of date, authors on the subject. The intrepid explorer, Fortune, gratefully ascribed the

saving of his life to a native practitioner who cured him of a fever. Able European specialists are taking up the important question of the vast native "materia medica" with increasing interest and success; and as the foreign doctor is constantly winning his way to native favour, and more and more Chinese adepts to western science are being enrolled, we may expect increasing benefits, not only to humanity and science, but also to manufacturing industry and to commerce, from their researches.

Tin.

The tin in slabs, obtained near Mongtsé, appears to have now definitively taken the route from that town by the Red River to Haiphong for export, as none appears in the Pakhoi export list for 1893.

Transit
passes.

The transit pass trade of the year was considerable, though confined to the sending of two articles, kerosene oil and matches, into the interior. Of 1,369,430 gallons of oil imported, over 250,000 gallons were sent up country under transit pass, mostly to Lien-Chow.

Towards the end of the year there was a renewal, on the part of certain tax offices in the interior, of the obstruction which had lain dormant for nearly 3 years, and the Consul's intervention was applied for to defend the Merchant's Treaty rights.

Death of the
first British
merchant.

The whole of the transit pass trade was conducted by a German firm, the only European firm at the port. I regret to record the death of Mr. Edward Hertton, the energetic pioneer of British mercantile enterprise in these regions, who has been mentioned in several previous trade reports from Pakhoi and Kiung-Chow. Mr. Hertton was the author of an able pamphlet on the fiscal difficulties in the southern provinces, of which he had a long and bitter experience. There is now no British merchant at Pakhoi or Hoi-How.

Junks and
their carrying
trade.

The junk traffic deserves some attention. Some people have held that the late increase in Pakhoi's trade is merely a transfer of carriage from junks to steamers. I do not believe that such falling-off as has occurred in the trade carried by these sailing craft will account for the increase in the steamer-borne merchandise. Here follows some particulars, of which I cannot guarantee the absolute accuracy where statistics are dealt with.

Imports.

The "Macao" junks which come to Pakhoi from Chan-Tsun, about 20 miles west of Canton, Kong-Men, and Fatshan, all in the Canton prefecture, bring coarse paper, dye-stuffs, native oil-man's stores, dry goods, and pottery. There are said to be 10 or 12 junks on this line, each making three or four trips a year. They are said to have imported in 1893 about 2,000*l.* worth of native cloth, and about 600 tons of other merchandise valued at 25,500*l.* They carried back to the places abovementioned ground-nut cake, oil, and husks, beans, "marine delicacies" (edible sea-weeds, &c.), salt fish, betel nuts, false gambier root for dye-stuffs, &c.

Exports.

Junk export
of ground-nut
products.

Of the important export, ground-nut oil, over 2,000 tons were carried coastwise in junks, value at about 45,000*l.*; of the cake, over 1,000 tons, worth about 3,500*l.* The export of ground-nut

products in junks thus considerably surpassed the export in steamers, which was worth only about 19,000*l*.

The junks trading with the neighbouring Island of Hainan are said to have brought from there, in 1893, about 360 tons of cocoanut fibre, worth under 3,000*l*.; of melon seeds about 24 tons, worth about 250*l*.; of betel-nuts, about 12 tons, valued at under 100*l*.; and of native cloth, about 960*l*. worth.

Junk trade
with Hainan.
Imports.

To Hainan the junks carry, in return, iron pans, coarse crockery or pottery, and fire-crackers. There are of course other miscellaneous goods traded in with the island. It is worthy of notice that the value of the steamer-borne native goods only amounted to 2,802*l*., mostly imported from Hainan.

Exports.

From Singapore the junks bring mangrove bark, used to dye with, rattans, and other goods. To Singapore they carry cheap iron pans, made of a mixture of iron and sand; over 106,000 of these are said to have been carried by junks to Singapore and Hainan during the year, worth some 3,000*l*. Also common pottery: to the same places 300,000 pieces of pottery were conveyed, worth rather under 2,000*l*.; and fire-crackers, nearly 30 tons, worth nearly 900*l*.

With
Singapore.
Imports.
Exports.

A great many of the junks from Tonkin come laden with fish, or, if the harvest is bad here, with rice. [I may mention, incidentally, that of rice, according to French statistics, 41,000,000 fr. worth was exported (not only in junks, of course) from Cochin-China to ports in China during 1891, and 75,000,000 fr. worth during 1892.] Junk also bring, from Tonkin and Annam, raw cotton, tree-varnish, ox-bones, duck's feathers, various woods, betel-nuts, beans, and very large quantities of salt from even as far south as Tourane; also a tuberous root called shu-liang* (faux gambier or false gambier), used to dye coarse native cloth and fishing nets a dark brown colour.

With Annam,
&c.
Imports.

Junks carry to Annam, &c., chiefly iron pans and coarse pottery. Chinese medicinal herbs go as far as Cochin-China by junks; so do Chinese liquid indigo, sauces, or soy, and a great deal of paper. On the other hand, both native dye-stuffs and medicines are brought back thence.

Exports.

A Chinese informant says that a very large quantity of rice was imported from Annam by junks, in addition to much from Kwangsi, last year, owing to the dearth caused by the floods already mentioned.

The large junk trade with the neighbouring French possessions is shown by French customs returns for 1892 (I have not seen those for 1893), which state the Chinese junk coasting trade between Pakhoi and Tonkin as follows:—Total entered and cleared, 1,442; tonnage, 56,721; cargo carried, 33,892 bales or packages, weighing 4,094 tons, and valued at 1,264,847 fr. (50,593*l*). But it is likely that here "Pakhoi," which means "Northern Sea," may include other ports in the neighbourhood such as Kinchow and On-Pu.

* Shu-liang, in Chinese; Canao, in Annamese.

An estimate which appears rather under the mark gives 300 tons of rice, value 4,800*l.*, as imported from Annam last year, with 120 tons of glutinous rice, medicines, and raw cotton, value 2,875*l.* The goods were conveyed in 10 merchant junks, about 100 fishing junks are said to have come in from the Tonkin coast bringing 600 tons of salt fish, worth over 3,800*l.*

Estimate of
total junk
trade.

Summing up the imports and exports specified above, we arrive at a grand total of 42,785*l.* for imports in junks, and 54,400*l.* for exports. Considerable doubt exists on the subject; more than double of this has been given as the probably correct figure before now, and it is impossible to speak with certainty.

It has been estimated, moreover, that junks and letter carriers from Pakhoi bring a certain amount of Yünnan opium to Hoihow annually, and doubtless much opium is transported in junks, as well as other things not specified in the above list. Still I daresay 100,000*l.* will cover the whole Pakhoi junk trade as it now exists. It was thought to be worth 2,000,000 taels (that is to say, three or four times as much as it is now) before the transfer to steamers commenced; but the trade of the port is now well over 4,000,000 taels and the junk trade is still not in a moribund condition. I conclude, therefore, that it is a great mistake to attribute the increase in Pakhoi's trade into a mere change from junks to steamers.

Pakhoi
progressive.

Pakhoi's
future.

Its com-
petitors.
Western.

Advance
from Tonkin
via Lungchow.

Forecasts of Pakhoi's commercial future are generally pessimistic in tone. Rivals from east and west are said to threaten it with downfall. Of these, the progressive French colony of Tonkin is the most immediately dreaded. Haiphong has steamer communication with Phu Lang Thuong in 8 hours. From Phu Lang Thuong, a railway, about 85 miles long, is being completed through Kep Bac Le and Thanmoa to Langson which is very near to the Chinese Kwangsi frontier; and just over that frontier is Lungchow, a place opened to French Annamese trade on June 1, 1889. Only two short, but difficult, sections of this railway remain to be built; and when completed it will open a French road to the important trade of Kwangsi, which province and Yünnan are Pakhoi's principal customers. From Lungchow to Nanning (the busiest place on the West River, and the river trade centre for four provinces) is 10 days down stream; and it is said that boats 50 feet long and 10 feet broad, drawing 3 feet, carrying over 20 tons, can easily get up to Lungchow by this waterway at any season in about 15 days, except when the river is too low (February to May), or swelled by the rainy season (July to October), when of course the time taken is much longer.

Nanning,
and roads
to it.

Now Nanning is the place in the interior to which Pakhoi sends more of its imports than to any other, and Nanning sends to Pakhoi in return coarse paper, anised, anised-oil, rushes, hides, horns, tea, native opium, gall-nuts, medicines, and kingfishers' feathers, &c.

Nanning is situated on the West River, near the confluence of the Right River, which is the Yünnan and Kweichow water route, and the Left River. (It should be mentioned that the "Right"

River would be in European geographical parlance the Left River, and the "Left" River would be the Right River). There is said to be seven times as much commerce by the "Right" River (Yu Kiang) as by the "Left" (Tso Kiang), which latter takes one to Lungchow, the new port opened to French trade in Kwangsi. Nanning's imported piece-goods and cotton threads ascend by the Right River to Posê, the end of the navigation, and are distributed among the markets of Posê, Mongtsé, Pu-erh, Shunning, Szemao. They have been even met, it is said, at Momein, on the frontier of Burma, 70 day's walk from the Gulf of Tonkin. Nanning has many local industries: making of iron implements and tools, paper-making, and establishments where silk and cotton are dyed. It has, for a Chinese town, abundant telegraphic communication.

There are three or four roads ordinarily used from Pakhoi to Nanning, a distance of about 230 miles. One is as follows:—

Pakhoi to Kinchow (otherwise called Yamchow), lying to the west, generally by sea, 50 miles (with a fair wind), 1 day; Kinchow (or Yamchow) to Nanning, by land, 122 miles, 8 days. If the land route be followed all the way it takes 3 days to Kinchow, or 11 days in all, instead of 9 days to Nanning. The road is difficult and hilly, and only available for goods easily divided into small parcels. The cost of transport is over 7s. per cwt. It is said that the land carriage from Pakhoi to Nanning costs more than the boat carriage of 400 miles farther, from Nanning to Posê. Posê is away up in the north-west of Kwangsi at the head of the navigation of the Right River. It takes 17 days from Nanning to Posê.

Another is as follows:—

Pakhoi to Kinchow, by sea, at least 1 day; from Kinchow, going almost due north, to the Ling-shan River (boats with nearly 6 tons of cargo can follow this route), 4 days; further, to Nan-hiang (about where the West River comes farthest south), by land, 3 days; Nan-hiang to Nanning (by the West River), 6 days, in all 14 days. This route is used for heavy and bulky goods, such as piece-goods, woollens, metals, &c.

There is another route not passing by Kinchow, but going at first more directly north, which takes the porters 8 days, and can be traversed by letter carriers, who of course walk faster, in 5 days. Boat is taken from Pakhoi to Sha-kang. Porters cannot do much more than 20 miles a day on an average.

A railway might be made from Pakhoi without great difficulty. It was expected that the Chinese would make a railway from Pakhoi to Nanning 6 years ago, but the expectations came to nothing. It would give Pakhoi a great advantage in speed of carriage over its importing rivals, but, unfortunately, the railways built in China, like the telegraphs, seem for the present to be built for strategic, and not for commercial considerations. That decent walking roads should not have been made in a country where labour is so cheap, and where, moreover, to find work for the unemployed is often such a serious problem for the authorities,

Carriage of
goods by
porters.

and that the system of carriage should be still that of Central Africa, by coolie porters, is one of those things which throw discredit on the popular conception of the Chinese as a practical people with a turn for trade. Good roads are wanted. With the present ones coolies carrying goods are said to take 15 days to reach some parts of Kwangsi, and the cost of transport by this primitive means to come up to 6 c. per catty ($1\frac{1}{3}$ lbs.) of merchandise, or over 15s. per ton.

Pakhoi's
competitors:
Eastern.

From Canton to Nanning by the West River is a junk journey of some 600 miles against stream, taking about 35 days, and exposed to delay and danger from head-winds and rapids; so Pakhoi has greatly the advantage in point of time and security. The colony of Hong-Kong is now, however, asking that steps should be taken for the opening of this great river to the steamers of all nations, and the making of Nanning and Wuchow into ports open to foreign trade. It is pointed out that from the southern ports now open the interior marts of Fuhkien and Kwangtung are scarcely reached, and the great inland provinces of Yünnan, Kwangsi, and Kweichow, from a commercial point of view, hardly touched at all, although the two latter are among the eight provinces which draw supplies of foreign goods from Hankow, Ichang, and Chungking by the Yangtze River. An influential chamber of commerce at home has interested itself in this subject and the kindred one of the unsatisfactory treatment of imported goods, which are sent into the interior under transit passes, and, nevertheless, burdened with likin duties. With regard to this grievance, it is generally conceded that a great impulse to trade would be given by the establishing of the transit pass trade on the basis contemplated by the treaties; and it is desirable that the one-payment system already introduced as regards opium should be extended to all imports. At present there are 10 likin stations between Canton and Wuchow, where boats have to stop and pay toll, and six between Wuchow and Nanning.

Hong-Kong
and the
Kwangsi
trade.

Wuchow, its
trade and
connections.

Wuchow's principal trade is in wood and enormous bamboos, which reach Canton by rafts—regular floating villages. A traveller says it imports between 30,000 tons and 40,000 tons of salt annually. Junks transport from Canton great quantities of foreign piece-goods and kerosene, but to escape the likin stations many foreign goods capable of being divided into small packages come viâ Pakhoi by porters. Wuchow stands at the junction of the West River and a branch, the Fu Ho, or Prefectural River, about 200 miles long, which descends from Kweilin, capital of Kwangsi, full of rapids, of which there are said to be 350. Junks carrying nearly 30 tons are said to go up. The voyage takes over 3 weeks under the most favourable conditions of wind and water. From Canton up to Wuchow, the main river is navigable, it is said, for steamers drawing 12 feet.

Advance from
Tonkin viâ
Mongtsé.

Mongtsé, in South-Eastern Yünnan, was opened to French trade in 1889, and offices of imperial maritime customs were established here, as at Lungchow. It has already a transit trade

inwards with Yünnan, Szechuen, Kweichow, and Kwangsi. The capital of Tonkin, Hanoi, has a straight water route to Yen-bai and through to Laokay, and from Laokay to cross the Chinese frontier to Mongtsé is not far. The junk traffic is much hindered, and rendered very dangerous, in the upper waters of the Red River by freshets during the rainy season, and many wrecks occur. But steamers have for years run from Hanoi to Yen-bai; and the French established, in October, 1893, a regular service of steamers between Yen-bai and the Yünnan frontier at Laokay. "The simple and evident approach to Eastern Yünnan," wrote Baber, "is from the Gulf of Tonkin." Pakhoi, like Haiphong, is on that gulf, but both Pakhoi and Canton will, no doubt, have to encounter very serious competition from Tonkin in this particular region, especially if a Tonkin railway line is made to Laokay, as has been proposed. Still, a recent French traveller, from whom I have frequently quoted, holds that the true commercial route for Southern Yünnan, Western Kwangsi, and Southern Kweichow, is that which connects these regions with the Tonkin Gulf at K'inchow and Pakhoi, which are the principal centres of distribution for a square of country almost as large as France.

Yünnan is a large province, and must be increasing in prosperity and population in the quiet times it is now enjoying. It must not be forgotten that from 1855 to 1873 it was devastated by the so-called "Mohammedan rebellion," which, says M. Rocher, its historian, "caused more ravages than it is possible for civilised nations to conceive," and, no doubt, greatly interfered with the mining and other industries, and the commerce of the province. Besides internal repopulation, immigration from the neighbouring one, Szechuen, and even from Hunan, has been going on since; and China's power of rapid recuperation has been proved, after the Taiping rebellion, in provinces better known than Yünnan. It is to be hoped, therefore, with some confidence, that the trade may grow until there is enough for all routes, and that the Yangtsze route from Shanghai, the Red River from Tonkin, West River from Canton, and the approaches from Pakhoi, all participate and profit in it.

Elasticity of
the Yünnan
trade.

We find encouragement for thinking this from the fact that Hankow, on the Yangtsze, from the north sends as far as Kweilin, the capital of Kwangsi, considerable supplies of shirtings, kerosene oil, &c., although from Hankow to Kweilin is at least double the distance from Canton to Kweilin, and a far more difficult route, as from Canton via Wuchow one river route can be used all the way; and Pakhoi, from the south, also trades largely to as far up as Kweilin. Hankow and Ichang, as well as Mongtsé, supply the wealthy Szechuen province. Hankow and Canton alike send goods to the province of Kweichow, to whose capital Pakhoi sends imported cotton yarn and piece-goods.

As with Yünnan, there seems no reason why Kwangsi, which already obtains foreign goods from places as far apart as Hankow, Mongtsé, and Pakhoi, should not continue to do so, and in increasing quantities. Its population must be increasing also, as

Elasticity of
the Kwangsi
trade.

it recovers from the devastating effects of the Taeping rebellion, and the disturbed zone between the province and Tonkin shrinks and disappears. A new industry is being introduced, that of sericulture. In the neighbourhood of Kweilin and Wuchow, says an official report in the "King Pao" ("Peking Gazette"), in April, 1891, the rearing of silkworms is almost universal, and the quantity of silk produced very large. In that year steps were taken to encourage the spread of this industry in five other districts in the province by exemption from taxes.

Sericulture.

Six or seven crops are said to be produced in a year in this mild equable climate. 80,000 lbs. of silk were turned out, it appears, during a period of about a year ending in March, 1891. There are factories in native style at Kweilin and at Wuchow, and Cantonese merchants regularly visit Wuchow to buy silk. Wuchow communicates by water with every silk-producing town. The great silk district of the neighbouring Kwangtung province, Shun-täk, is near; and the country being covered with bamboo groves, there is abundance of cheap material for utensils and machines. At the date of my writing this, official notifications have just been issued, exhorting the people to this remunerative business, stating that it is making great progress at Ch'ang-Lok, some 50 miles to the north-east of Pakhoi, in the same prefectural district, and giving minute instructions as to the planting and rearing of mulberry trees.

It is a pity that nothing is done to develop the rich Kwangsi province in other ways, road-making, railway building, and coal mining. It is said to contain abundance of coal, and also some silver.

Pakhoi
growing.

To conclude, whether or not Pakhoi's rivals prevent its trade connections from continuing to extend far into the interior in various directions, its commerce with seven or eight fairly prosperous and growing districts (Hiens) is not likely to be lost. The town itself is growing, and more and more land coming into cultivation around it. Piracy is less common on the coast. The Chinese merchants (in whose hands the trade virtually is) have increased in number; and though each may complain that it is harder for him to make money, owing to the competition, it is surely for the advantage of the port in general.

Annex A.—RETURN of all Shipping at the Port of Pakhoi during the Year 1893.

ENTERED.

Nationality.	Steam.	
	Number of Vessels.	Tons.
Danish	75	29,634
German	65	34,192
French	2	132
Total	142	63,958
„ for the year pre- ceding.. .. .	102	44,865

CLEARED.

Nationality.	Steam.	
	Number of Vessels.	Tons.
Danish	76	29,989
German	65	34,192
French	2	132
Total	143	64,313
„ for the year pre- ceding.. .. .	101	44,510

Annex D.—TABLE showing the Total Value of all Articles
Exported from and Imported to Pakhoi to and from Foreign
Countries during the Years 1893–92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Hong-Kong	167,623	210,599	643,814	647,956
French Indo-China ..	..	..	5,264	..
Total	167,623	210,599	649,078	647,956

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CHINA.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF HANKOW.

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1311. Valparaiso	2d.	1370. Genoa	3½d.
1312. Mozambique	1d.	1371. Batoum	2d.
1313. Odessa	1½d.	1372. Rouen	2½d.
1314. Honduras	2½d.	1373. Santo Domingo	½d.
1315. Batoum	4d.	1374. Nantes	1½d.
1316. Quilimane	1d.	1375. Taganrog	2½d.
1317. Copenhagen	1d.	1376. Ispahan	4½d.
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1319. New York	1d.	1378. Cagliari	1d.
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1329. Paramaribo.. ..	1½d.	1388. Madeira	½d.
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1331. Patras	1½d.	1390. New Orleans	2½d.
1332. Calais	2½d.	1391. Manila	2d.
1333. Loanda	1d.	1392. Foochow	1d.
1334. Bordeaux	2½d.	1393. Ningpo	1d.
1335. Taganrog	1d.	1394. Chinkiang	1d.
1336. Galveston	8½d.	1395. Tamsui	1d.
1337. Riga.. ..	2d.	1396. Chungking	1½d.
1338. Batavia	1½d.	1397. Philadelphia	3½d.
1339. Boston	1½d.	1398. Bilbao	2½d.
1340. Baltimore	1½d.	1399. Dunkirk	1d.
1341. Havre	2½d.	1400. Amoy	1½d.
1342. Vera Cruz	1d.	1401. Tainan	1d.
1343. Saigon	1½d.	1402. Ichang	1d.
1344. Stockholm	2d.	1403. Aleppo	1d.
1345. Galatz	1½d.	1404. Madrid	1d.
1346. Trebizond	1d.	1405. Newchwang	1d.
1347. Algiers	3d.	1406. Wenchow	3d.
1348. Amapala	½d.	1407. Pakhoi	1½d.

No. 1408.

Reference to previous Report, Annual Series No. 1231.

CHINA.

HANKOW.

Mr. Warren to the Earl of Kimberley.

My Lord,

Hankow, March 19, 1894.

I HAVE the honour to forward, under separate cover, my Report on the Trade of Hankow for the year 1893.

I have, &c.

(Signed) PELHAM WARREN.

Report on the Trade and Commerce of Hankow for the Year 1893.

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General.

The conditions of foreign trade at Hankow during 1893 were not altogether satisfactory. Although the total value of the trade, when expressed in Haikwan taels, shows an increase over that of 1892 amounting to 2,495,247 taels, yet there is actually a falling-off in the sterling value of the trade, which amounts to 1,007,578*l*. This decrease in the sterling value is to be attributed to the steady fall in exchange during the past year. In 1892 the average value of the Haikwan tael was 4*s*. 6*d*., whilst in 1893 it was barely 4*s*.

A falling-off
in sterling
value.

Imports.

Increase in
import of
silver.

One of the most noticeable features in the trade is the enormous increase in the import of silver and the corresponding decrease in imports generally.

Exports.

Exports.

Exports, on the contrary, have improved all round, and this is in a great measure due to the low rate of exchange, which was in favour of exporters. Still, the steady drop in exchange which prevailed was to some extent prejudicial even to export business, as those engaged in it were afraid of stepping in too far lest a further drop might leave them with goods on their hands which they were unable to dispose of, whilst those who bought later would be in a position to under-sell them. In fact, the silver question has tended here, as elsewhere, to cause a general disturbance of trade.

Silver
question.

Shipping.

Increase in
British
tonnage.

The total tonnage employed during the year amounted to 1,541,296 tons, of which 989,464 tons were British. Of the remaining tonnage the chief share was taken by China, and amounted to 483,246 tons, which includes lorchas and chartered junks. There was a considerable increase in tonnage as compared with 1892, close upon 60,000 tons, the whole of which was British. At the present moment the total number of steamers plying regularly on the river is 20, and all are under the British or Chinese flag, the British tonnage employed being 14,175 tons and the Chinese 6,208 tons.

Lights badly
wanted on the
Upper
Yangtze.

The usual difficulties have been experienced in the navigation of the Upper River, which is still unlighted. Steamers, in consequence, have to anchor at night or run the risk of grounding on some of the numerous banks and shoals. The danger is especially great when the river is at its extreme height, at which time vessels sometimes miss the river altogether and take the ground in the paddy-fields or rush-beds, where they do not always meet with that assistance from the natives which might be desired.

Chartered
junks.

The chartering of junks for down river has been greatly

interfered with by certain proclamations, issued by the Chinese authorities at Nanking, prohibiting the chartering, for the return voyage, of salt-junks employed bringing salt up-river. The reasons put forward are that this chartering of junks to foreigners prevents the collection of certain duties which should contribute towards the provincial revenues, and there is not much doubt that this is the case, such duties as are collected going to swell the Imperial revenue. In consequence of this action of the Chinese authorities, the junk-chartering here has practically ceased. This will not, I think, throw more freight into the hands of the steamer companies, for the cargo carried by chartered junks is of a nature that they do not care to take, such as poles, gypsum, coal, &c.

Freights.

Steamer trade on the river was well maintained during the year. The short crop of grain, &c., in the north, created a demand for rice, peas, beans, and bean-cake, which were exported to a considerable extent, greatly to the benefit of the export trade. On the other hand, the fall in exchange seriously affected the import of piece-goods, with the result that the steamers on the Upper River, Ichang line, have suffered somewhat for want of cargo.

In consequence of an arrangement entered into by the five lines of steamers running on the river, rates of freight were well maintained, while the passage-money for natives was slightly raised. Some alterations were made in the rates of freight, the most important being that on foreign-shipped produce, which was placed on the lowest possible level in order to induce through shipments to Europe and enable resident firms to compete with Shanghai buyers for all produce passing through this port, such as hides, tallow, gall-nuts, hemp, &c.

Combination
to keep up
rates of
freights, &c.

The raising of native passenger rates has to some extent operated to check the gangs of steamer thieves who used to reap a rich harvest travelling up and down and plundering their fellow passengers.

The combination entered into by the steamer companies has further enabled them to oppose a successful resistance to the strong Swatow guild at this port. Under the old system freights and duties, go-down hire, and insurance premia were only collected once a year, at China New Year, but the failure of one of the largest Swatow firms in November last, with liabilities of about 80,000 taels, caused the steamer companies to insist upon all freights, &c., being paid at the port of destination. This change was effected after much opposition on the part of the guild, who tabooed the China Navigation Steamship Company, whom they held responsible for it. The other companies thereupon refused to carry Swatow cargo until the taboo was removed. The trade came to a standstill for about 14 days, when the

New system of
collecting
freights and
other charges.

shippers gave in, and accepted the terms offered by the steamer companies.

Freights
during the
tea season.

In the tea season freights for London opened at 4*l.* per ton, the "Moyune" being loaded at that rate and despatched on May 27. She was followed by the "Priam," on June 6, at 2*l.* 15*s.* per ton, which rate was maintained throughout the season. The "Flintshire," "Benledi," and "Glengarry" only obtained small cargoes. For Odessa direct 7 steamers loaded on private terms, as against 6 in 1892.

Total value of
trade.

The total value of the trade for 1893 was 12,548,069*l.* as against 13,555,647*l.* in the preceding year:—

					Value.
					£
Foreign imports	..	..	..	..	2,889,552
Native	"	..	..	..	2,540,633
Total	..	..	..	..	5,430,185
Exports	..	..	..	..	4,770,047
Re-exports	..	..	..	..	2,347,837
Grand total	..	..	..	..	12,548,069

The falling-off shown by these figures was entirely due to imports, which declined to the extent of 1,097,192*l.*, viz., foreign, which decreased by 937,746*l.*, and native by 159,446*l.*, the value of the export trade having, on the other hand, increased 89,614*l.*

Imports.

Imports.

The principal articles imported were as follows:—

Cotton goods.

There has been a most marked falling-off in the import of all descriptions of cotton goods, as will be seen from the return of imports attached to this report.

Shirtings.

Grey shirtings fell off 434,827 pieces, the import being rather more than 30 per cent. less than during the previous year; and other descriptions of cotton goods show a decrease of about the same amount. This sudden collapse of the trade is almost entirely due to the steady fall in exchange, native dealers refusing to give the higher prices which importers were obliged to ask. The cotton goods turned out by the mills at Wuchang may have affected the import, but to an extent barely appreciable except in the matter of Bombay yarn, which shows a falling-off of more than 50 per cent., for the whole of which the falling exchange cannot be held responsible. The cotton mills, as at present worked, are not likely to injure the Manchester trade much; the cotton used is of too harsh a fibre, and the cloth cannot compete with any but inferior Manchester goods. Should, however, foreign cotton be imported, as has been suggested, there

can be little doubt that the cloth turned out will compete successfully with foreign manufactures. In the meantime, as far as the yarn is concerned, it is competing successfully with the foreign import, as its coarseness and harshness do not unfit it for use in the manufacture of the rough cotton cloths and druggets turned out by the native manufacturers at this port.

Woollens show a similar falling-off in every description of Woollens. goods; in fact there is a decline in every foreign article of import except kerosene oil, the import of which has nearly doubled, Kerosene oil. having risen from 4,737,050 gallons in 1892 to 8,103,520 gallons. Great increase. The trade in kerosene increases yearly, and the use of it seems to be extending throughout the entire country. At present, the bulk of the oil imported is American, but there seems no doubt that as soon as the oil-tanks at Shanghai are opened, which it is said they will be very shortly, all the river supplies will be drawn from Russia. Indeed, it seems more than probable that tanks will be built here and the oil imported direct before long. It appears that the ever increasing import of kerosene has something to do with the larger export of vegetable tallow to foreign markets, as the oil is gradually taking the place of tallow here.

Opium.

The import of Indian opium was nearly identical with that of Indian opium. 1892. There was a falling-off in Malwa of 2,466 lbs. and a corresponding increase of Patna of 2,873 lbs.

The import has been steadily declining for some years, and sooner or later its use will be given up altogether except by the wealthier classes and its place taken entirely by native drug. The poppy is daily planted more freely, and the cultivation is Native opium. encouraged rather than otherwise by the native authorities. Szechuan opium compares very favourably with Indian as to price, and is said to be steadily improving in quality. This opium and that produced in Hupei are most in demand in this district. The Hupei drug is considerably cheaper than that from Szechuan, but the production is small. Somewhere about 80 per cent. of the entire amount consumed in this immediate neighbourhood is native drug, and as the place is thickly populated and the proportion of smokers, according to Chinese estimates, is 60 per cent. of the adult male population, the total amount consumed must be very considerable.

Exports.

On May 4 four musters of tea were put on the market, and Tea. on the following morning 61 chops of Hankow tea representing some 30,000 half-chests were on offer. The same afternoon 40 chops or 12,000 half-chests of Ningchows arrived from Kiukiang. By May 6 arrivals had largely increased and musters were out
(1757)

representing altogether about 110,000 half-chests from the various districts. The market was then opened by the purchase of some chops of Oonfaa at from 1s. 1d. to 1s. 2 $\frac{3}{4}$ d. per lb. There being so much tea on the market to select from, no great eagerness to buy was exhibited.

The weather was unusually fine in the spring, and everything combined to allow the new teas being brought to market early, the consequence being very large arrivals during the first few weeks of the season. Business was conducted in a steady manner, and with a quiet market prices soon became weak, and in many cases showed a substantial decline, teamen in a short time being glad to sell as they received orders. At the commencement, the general impression was that the first crop would be much larger than the previous year, though, as usual, it was impossible so early to obtain any reliable information about supplies. The only chance of a check to production lay in the fact that teamen, having paid too high prices up country, were losing considerably.

Buying was
for Russia and
America.
Prices too
high for
London.

For the first two weeks, buying was almost entirely for Russia and America, the quotations being considered too high for the London market.

When the season was some 3 weeks old there was a complete change of front on the part of the teamen who became firm holders for higher prices. This change was, to a great extent, due to the fact that the native banks declined further facilities to the trade in consequence of the severity of the losses already incurred by the teamen; no further advances were obtainable, and orders were despatched up country to suspend all operations, so that, after all, the first crop yield was only some 5 per cent. above that of the preceding year.

Cost of first
crop.

The average cost of first crop purchases was 10 $\frac{3}{4}$ d. per lb., as against 10 $\frac{3}{4}$ d. in 1892, and 1s. 4 $\frac{1}{4}$ d. in 1891.

Early in June the whole of the first crop had been received, and as supplies stopped there was a rise in price of about 1 tael per picul on all the cheaper sorts. About the end of the month the market freshened up, and this was in great measure caused by a sudden and unexpected fall in sterling exchange arising from the closing of the Indian mints to silver. The benefit, however, of the lower exchange was soon lost, for tael prices advanced in almost equal proportion. Very limited preparations had been made by the natives for second crops, as nothing but low prices had been looked for, but on arrival of the teas they were, although of very ordinary quality, and, in some cases, damaged from careless preparation, sold some 1 $\frac{3}{4}$ taels more than they averaged the previous year. In course of time considerable orders came in for common teas, and the prices paid were high enough to bring forward far more leaf than would otherwise have come down.

London
market.

The London market opened on a higher level for common teas, 6d. per lb. being the lowest quotation, against 5d. in 1892, and this for inferior teas as compared with early arrivals in the former year. Very few fine Ningchows found their way to the English market, and these sold at good prices, the quality being

better than in the previous year. The consumption of Congou has for some time been steadily declining, but the limit appears to have been now reached, and the amount consumed in 1893 was slightly in excess of that in 1892. This probably means that there is a limit to the shrinkage of requirements for home use, and that, whatever may be the quantity imported from India and Ceylon, these teas will always need toning down to suit the consumer's taste

The total export for the season 1893-4 was as under :—

To—	Quantity.
	Lbs.
Great Britain direct	8,918,962
Russia direct and via Shanghai	21,809,270
Tientsin for Russia	16,935,604
America and Canada via Shanghai	6,078,986
Total	53,742,822

Which shows an increase over the export of 1892-3 amounting to 10,390,129 lbs.

An experiment already tried without success has been lately repeated. Tea plants have been sent from here to Russia to be planted on the slopes of the Caucasus. It is a private enterprise on the part of Messrs. Popoff Frères, but the ground is granted by the Government. About 2,000 plants have been sent at great expense, in obtaining which there was a certain amount of difficulty, the people in some districts destroying the plants on their way down to Hankow. It is not generally considered that the experiment will prove more successful than the former one. I have, however, heard that the plants arrived in Russia in excellent condition.

Experimental
tea-planting
in Russia.

Hides.

The export of cow-hides to London was about double that of 1892, viz., 5,960 cwts., as against 3,095 cwts., the greater part probably in transit for the Continent or America. Prices ruled very steady throughout the year, say about $8\frac{1}{2}$ taels per cwt. It might naturally have been expected that, with a fall of from 15 per cent. to 20 per cent. in exchange, and no material difference in freights, prices would have advanced. This, however, has not been the case, as home market prices have declined about 20 per cent., with a very fair demand for the article. As, in previous years, a very large proportion, nearly 80 per cent., of the total export was for continental ports.

Buffalo hides were in fair demand at the end of the year, and Buffalo hides prices advanced 10 per cent. to 15 per cent., but these do not, on the whole, appear to be desirable skins for the home markets.

Early in the year the prices of goat skins were rushed up to

Goat skins.

22 taels per cwt., chiefly for export to the United States, and the consequence is that holders there have had to put up with very substantial losses, for, at the close of the season, dealers were willing to sell somewhere about 17 taels per cwt.

Vegetable
tallow.

In consequence of the fall in exchange this business has been resumed for home markets after a lapse of some 20 years, and there is every prospect of its assuming large proportions. During the last quarter of the year there was a very strong demand both from natives and from foreign exporters, which will probably result in a considerable advance in tael prices during the early part of 1894. The quantity of vegetable tallow that could be produced, if there were a demand for it, is practically unlimited.

Gall-nuts.

During the early part of the year there was a strong demand for export owing to supplies not being quite up to expectations. Prices advanced to 11 taels per cwt., at which price natives hoped to do an extensive business with foreigners at the commencement of the new season—about September. They have, however, been disappointed, as 10 taels per cwt. is the price they have had to accept. Very large quantities have gone forward to the Continent during the last few months by the steamers of the “Norddeutscher Lloyd” and “Shell” lines, their rates being 5s. per ton less than other steamer companies. Doubtless, with full cargoes, it would pay the latter line very well, as they are obtaining full cargoes of petroleum, &c., outwards. The total export of gall-nuts amounted to 63,111 cwts., as against 55,335 cwts. in 1892.

Tobacco.

Tobacco-leaf shows an increase of 50,625 cwts. over the export of 1892, whilst prepared tobacco has fallen off to the extent of 12,694 cwts. The total export of leaf and prepared amounted to 191,304 cwts., the value of which was 308,036*l*. A good deal of the tobacco exported from this goes to London, but owing to the large stocks in the London market the shipments in 1893 were very limited, and the result has been that the natives have incurred heavy losses.

Bristles.

Bristles are an article the export of which to Europe is steadily increasing.

White wax.

The export of white wax was very nearly the same as in the previous year. It continues to decrease in value, being now worth only 90 taels per picul, as against 120 taels 12 months ago.

Silk

The export of yellow silk was considerably larger than in 1892; it amounted to 1,475,867 lbs. The export of white silk was also somewhat large, while refuse declined. Cocoons, on the other hand, rose from 58,387 lbs. in 1892 to 1,368,038 lbs. The value of the entire export was 546,780*l*.

Szechuan
opium.

The export of this article is steadily increasing: 322,134 lbs. were exported in 1893, as against 285,733 lbs. in 1892, and 44,000 lbs. in 1891.

Transit Trade.

Outward.

The transit trade outward was as usual nil, that is to say, no transit passes were taken out, the produce exported paying the

usual dues at the native barriers and custom-houses on the way down to the port.

The inward transit trade under passes amounted to 748,432*l.*, Inward. a falling-off of 383,381*l.* as compared with 1892. This is to be accounted for partly by the increasing trade in chartered junks direct to Chungking, and partly by the general falling-off in foreign imports noted above.

The value of the imports sent into Szechuan under transit pass was 90,087*l.* Transit trade to Szechuan province. Kerosene oil.

Kerosene oil figures to the extent of 903,440 gallons, or about 12 per cent. of the total import.

Indian yarn shows only 3,039 cwts., as against 7,614 cwts. of Indian yarn. Yarn from the Wuchang cotton mills.

The rest of the goods sent up under transit pass comprised piece-goods of various descriptions, metals, matches, dyes, &c. Various goods.

Public Works.

The iron works at Hanyang are not yet opened, but it is expected that they will be working very shortly, as the Viceroy is anxious they should begin soon. 3,000 tons of coke have been ordered from Belgium to be used in smelting operations. This seems somewhat curious considering that we have coal on all sides of us, but apparently none suitable for the purpose has yet been discovered, though there is said to be an abundance of the right sort in the Hunan province.

The Viceroy's cotton-mill commenced to turn out cloth and Cotton mills yarn in April last. Some 700 looms are at present working. A new spinning factory will be soon built, the machinery for which has been supplied by an English firm. I forwarded samples of the cloth, with retail prices affixed, to the Foreign Office in September. The yarn is made from cotton grown in this province, but for the finer descriptions of cloth native cotton is imported from Shanghai. I have not succeeded in learning the total output of the mills during 1893.

A small mint capable of turning out 10,000 dol. a day is to be Mint. soon erected at Wuchang. The machinery for it has been bought in Germany.

A silk filature is also spoken of.

Silk filature.

I have to thank Mr. R. B. Moorhead for his courtesy in placing the customs returns at my disposal.

NOTE.—It is almost impossible to fix a sterling value for the tael, as the price of silver fluctuated so much during the year.

Annex A.—RETURN of all Shipping at the Port of Hankow during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	8	2,888	523	491,895	531	494,783
Chinese	171	36,757	179	177,826	350	214,583
German	...	...	...	...	...	...
Russian	...	...	6	14,872	6	14,872
Austrian	...	...	23	18,019	23	18,019
Lighters towed ...	...	...	2	1,392	2	1,392
Total	179	39,645	733	704,004	912	743,649
„ for the year preceding ...	157	34,644	687	673,628	844	713,272

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	7	2,786	523	491,895	530	494,681
Chinese	907	90,857	179	177,826	986	268,683
German	...	...	...	...	...	...
Russian	...	...	6	14,872	6	14,872
Austrian	...	...	23	18,019	23	18,019
Lighters towed ...	...	...	2	1,392	2	1,392
Total	814	93,643	733	704,004	1,547	797,647
„ for the year preceding ...	654	77,538	694	687,450	1,348	764,988

Annex B.—RETURN of Principal Articles of Import to Hankow during the Years 1892–93.

Articles.		1892.		1893.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Opium—					
Malwa	Lbs. ...	63,870	77,311	63,800	47,180
Patna	" ...	33,280		36,160	22,347
Boiled	" ...	12		140	182
Cotton goods—					
Shirts—					
Grey, plain	Pieces ...	1,230,440	325,931	795,613	270,508
White	" ...	573,205	264,390	390,918	171,222
T-cloths	" ...	152,692	39,509	106,247	31,892
Drills	" ...	94,786	49,767	71,885	38,931
Sheetings	" ...	79,908	39,579	73,429	37,739
Chintzes and furnitures	" ...	157,532	49,625	135,615	46,111
Cotton lastings	" ...	60,948	39,769	50,958	32,613
Velvets	" ...	14,491	19,563	10,372	13,483
Velveteens	" ...	1,925	2,382	1,005	1,226
Cotton yarn	Lbs. ...	10,704,933	308,768	5,027,733	104,094
Woolen goods—					
Camlets	Pieces ...	37,608	74,470	23,140	55,717
Lastings	" ...	39,344	69,723	33,908	53,995
Long eils	" ...	30,885	30,576	29,067	30,229
Spanish stripes	" ...	10,245	20,514	7,675	15,350
Cloth, broad, medium	" ...	2,769	13,706	2,211	10,259
Lustres and Orleans	" ...	1,861	1,508	339	264
Italian cloth	" ...	27,707	32,140	22,523	22,558
Metals—					
Copper, Japanese	Lbs. ...	941,310	22,238	748,533	16,845
Iron, nailrod	" ...	4,765,373	16,899	4,630,800	15,292
Tin, in slabs	" ...	232,340	13,145	325,467	14,602
Lead, in pigs	" ...	2,343,230	15,026	3,607,733	21,105
Quicksilver	" ...	82,136	9,143	13,567	1,320
Sundries—					
Cotton, raw	" ...	4,223,600	95,506	3,212,134	63,598
Cuttle fish	" ...	2,132,000	30,940	1,930,400	25,373
Dyes, aniline	" ...	...	31,712	...	31,425
Ginseng, American	Lbs. ...	27,367	22,943	30,667	23,548
Matches	Gross ...	740,525	36,742	751,645	31,698
Medicines	" ...	...	69,392	...	51,888
Oil, kerosene	Gallons ...	4,737,050	104,720	8,103,520	157,617
Pepper	Lbs. ...	2,094,800	31,644	2,260,534	28,801
Sandal wood	" ...	2,760,800	35,408	2,804,400	32,811
Sapan wood	" ...	3,031,600	19,703	2,926,267	10,633
Seaweed	" ...	16,492,800	67,592	15,957,467	67,021
Silk piece-goods	" ...	357,600	285,176	281,200	206,234
Sugar—					
Brown	" ...	32,023,070	188,687	30,998,400	205,992
White	" ...	31,201,733	242,203	20,775,734	162,060

Annex C.—RETURN of Principal Articles of Export from Hankow during the Years 1892–93.

Articles.		1892.		1893.	
		Quantity.	Value.	Quantity.	Value.
Bean-cake	Lbs.	3,254,667	£ 3,625	22,687,600	27,225
Beans—					
Black	"	...	...	6,654,933	10,980
Green	"	42,081,867	71,030	10,023,867	16,540
Yellow	"	...	...	110,226,534	161,873
China-root	"	2,171,734	22,456	2,378,667	23,905
Cloth, native, and nankeens	"	1,709,067	83,655	1,661,733	68,566
Coal	Tons	44,123	47,655	46,275	40,723
Dye-stuff	Lbs.	2,274,134	5,074	2,579,467	24,846
Fungus	"	3,325,200	82,575	3,375,234	62,015
Gypsum	"	19,277,200	14,964	19,902,934	10,449
Hemp	"	16,310,800	159,642	14,646,400	143,530
Hides, cow and buffalo	"	6,670,634	92,304	9,521,067	132,319
Ironware	"	5,489,067	18,130	6,249,333	18,529
Lily flowers, dried	"	640,800	7,786	375,200	3,095
Medicines	"	...	257,381	...	225,682
Musk	Lbs.	3,571	108,476	4,468	105,218
Nutgalls	"	6,197,600	102,938	7,068,400	114,998
Oil—					
Sesamum seed	"	1,124,134	6,829	993,467	5,981
Wood	"	37,898,134	351,743	43,001,733	341,863
Opium, Szechuan	"	285,733	84,956	322,134	114,073
Paper	"	4,772,667	32,177	4,089,467	31,391
Rhubarb, Szechuan	"	1,004,267	32,202	1,081,066	24,072
Safflower	"	152,533	10,415	93,867	6,542
Seed—					
Lily or lotus	"	2,014,400	25,495	1,754,533	20,104
Sesamum	"	6,026,134	9,167	2,571,867	8,575
Silk—					
Raw, white	"	12,534	3,700	29,467	8,584
Yellow	"	1,120,400	325,238	1,475,867	420,641
Refuse	"	1,984,667	110,524	1,469,600	65,923
Cocoons	"	88,534	2,433	1,371,467	51,332
Steel	"	460,669	2,954	343,067	1,956
Tallow, vegetable	"	18,915,600	197,906	20,240,533	173,056
Tea—					
Black	"	5,187,067	1,646,145	65,216,534	1,966,534
Brick	"	14,568,267	159,796	20,384,934	183,464
Green	"	14,438,933	146,194	17,446,677	130,850
Tobacco—					
Leaf	"	6,771,200	67,417	11,881,333	101,585
Prepared	"	10,966,534	366,432	9,544,800	206,451
Varnish	"	1,467,600	67,698	1,358,667	60,327
Wax, white	"	1,325,067	95,703	1,304,533	132,203
Wood poles	Pieces	276,892	80,991	358,933	98,322

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AND FINANCE.

CHINA.

REPORT FOR THE YEAR 1893
ON THE
TRADE OF CHEFOO.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1187.

*Presented to both Houses of Parliament by Command of Her Majesty,
JUNE, 1894.*

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CHINA.

CHEFOO.

Consul Allen to the Earl of Rosebery.

My Lord, Chefoo, February 24, 1894.
I HAVE the honour to submit herewith my Report on the
Trade of Chefoo during the year 1893.
I have, &c.
(Signed) CLEMENT F. R. ALLEN.

Report on the Trade of Chefoo for the Year 1893.

ABSTRACT of Contents.

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Total Gross Value.

I append a table showing the total gross value of the trade of Chefoo during the last 3 years. Total gross value.

	Value.		
	1891.	1892.	1893.
	£	£	£
Foreign imports	1,446,581	1,237,525	870,408
Native "	630,301	497,961	487,735
Exports	1,014,491	1,076,904	1,002,169
Total	3,091,373*	2,812,390†	2,360,312‡

* At 4s. 9d. per tael = 13,016,269 Haikwan taels.

† At 4s. 2d. per tael = 13,499,471 Haikwan taels.

‡ At 3s. 6d. per tael = 13,436,065 Haikwan taels.

When the Haikwan tael drops from 4s. 2d. to 3s. 6d. it is almost inevitable that there must be a decrease in the sterling value of the trade at the various treaty ports of China, and at Chefoo among their number, but when the amounts are stated in silver, it will be seen that the total silver value of the trade in 1893 differs little from that of 1892, and is considerably in excess of that of 1891. When we separate the gross value into the several items of foreign imports, native imports, and exports, we find that foreign imports show the serious decrease of 1,023,503 taels, while the value of native imports has increased by 402,559 taels, and that of exports by 557,538 taels.

Foreign Imports.

Foreign
imports.

The following table shows the amounts of the principal articles imported into Chefoo during the last 3 years.

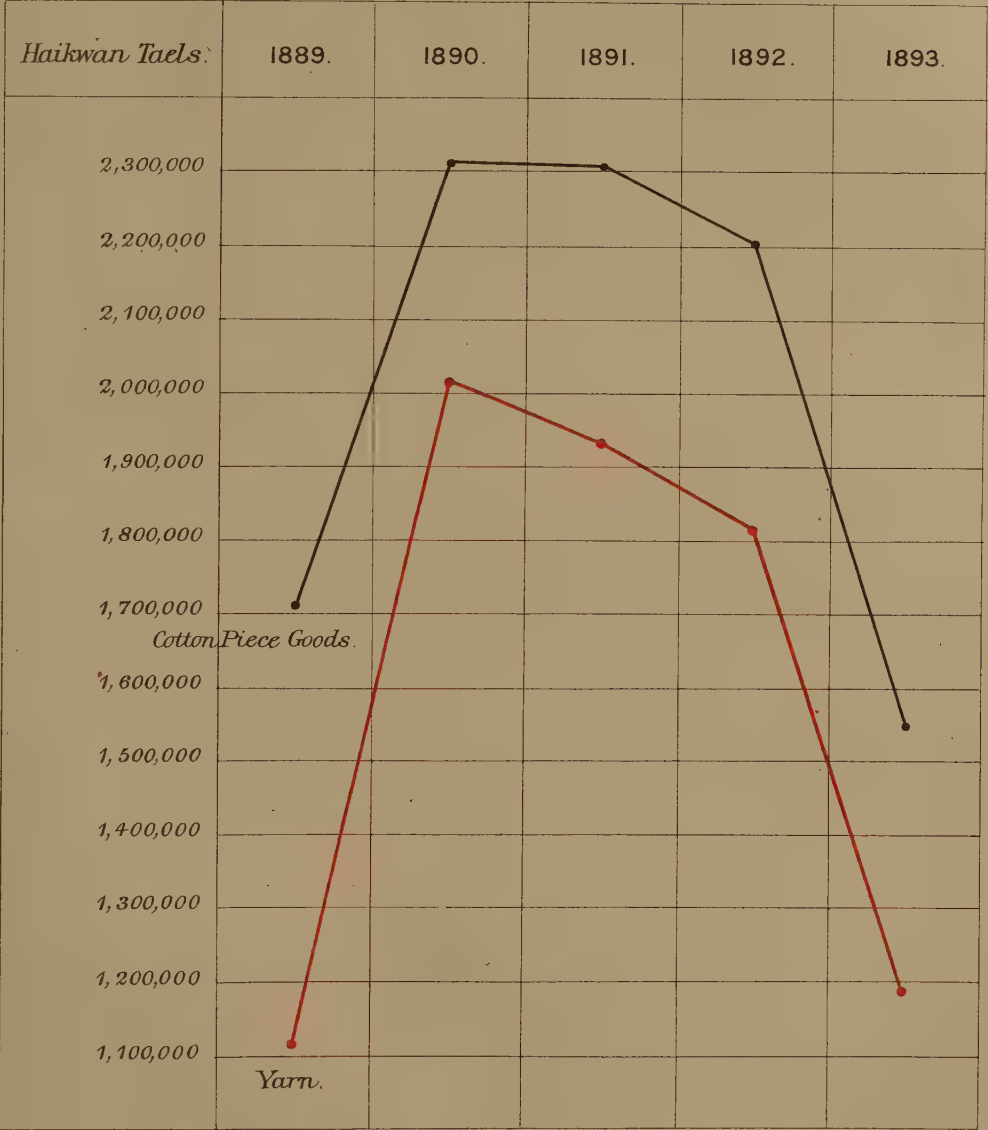
Articles.		Quantity.			Comparative table.
		1891.	1892.	1893.	
Opium—					
Malwa	Chests ..	131	133	163	
Patna	" ..	18	17	14	
Benares	" ..	183	161	162	
Cottons—					
Shirtings, grey ..	Pieces ..	259,990	240,669	204,408	
" white	" ..	54,890	51,156	33,408	
" dyed, plain ..	" ..	18,683	15,647	15,120	
" figured	" ..	17,642	23,593	17,068	
T-cloths	" ..	213,843	221,573	153,694	
Drills, English ..	" ..	38,433	31,756	27,871	
" American	" ..	76,819	64,215	37,679	
Jeans, English ..	" ..	2,640	3,056	7,909	
Sheetings, English ..	" ..	98,645	76,331	73,740	
" American	" ..	193,370	198,235	85,055	
Chintzes	" ..	27,221	35,139	29,001	
Turkey-reds	" ..	89,971	86,826	31,159	
Lastings, cotton ..	" ..	43,350	39,384	22,013	
Italians	" ..	7,392	6,071	12,930	
Velvets and velveteens	" ..	1,778	2,092	1,344	
Muslins	" ..	11,313	13,441	20,568	
Handkerchiefs ..	Dozen ..	6,130	10,079	5,440	
Towels	" ..	36,519	37,755	40,908	
Yarn, English ..	Tons ..	112	92	25	
" Indian	" ..	6,052	6,703	4,375	
Woollens—					
Camlets, English ..	Pieces ..	1,170	770	780	
Lastings, woollen ..	" ..	2,880	3,220	2,610	
Long ells	" ..	1,358	1,105	870	
Spanish stripes ..	" ..	2,269	1,660	1,092	
Lustres and orleans ..	" ..	2,100	460	360	
Metals—					
Iron, nail rod ..	Tons ..	2,419	1,940	1,600	
" bar	" ..	748	797	335	
" plates	" ..	331	400	..	
" wire	" ..	262	250	295	
" old	" ..	9,162	8,036	5,704	
Tin	" ..	28	113	29	
Lead	" ..	123	112	143	
Steel	" ..	514	451	591	
Sundries—					
Machinery	Value £	..	6,825	..	
Window glass ..	Boxes ..	6,767	2,367	5,802	
Matches	Gross ..	262,544	242,757	228,655	
Needles	Mille ..	267,951	269,500	252,890	
Oil—					
Kerosene, American	Gallons ..	1,318,194	1,056,580	2,253,870	
" Russian ..	" ..	50,000	..	..	

The remarks to be made on opium in these reports might almost be stereotyped for annual use. Indian opium remains the luxury of the rich, and the trade in it is so small as scarcely to call for remark. There is a slight increase in the total amount imported in 1893, 339 chests, instead of the 311 chests of 1892, but the value of the Indian opium brought annually to Chefoo has dropped below 150,000 taels, and will probably become smaller still as time goes on.

CHINA.

Cottons.	A glance at the list of cotton goods, set forth in the preceding table, shows that there has been a falling-off all along the line, except in such unimportant items as jeans, Italians and towels.
Decreased import due to fall in exchange.	This shrinkage is easily accounted for. It is due almost entirely to the fall in exchange. Foreign goods of all sorts have eventually to be paid for in gold. It now takes 6 taels to make 1 <i>l.</i> , which a short time ago could be bought for 4½ taels. It stands to reason, therefore, that the English or American manufacturer cannot afford to sell at the rate in silver which used to pay him a profit, and the Chinese consumer cannot afford to buy as much as he did and so trade must diminish.
And possibly to other causes.	The Chinese say too that the bad harvests of 1892 lessened their purchasing powers in 1893, and, further, that districts in the west of this province, which formerly were supplied from the Chefoo market, are now dependent on that of Tientsin. I do not, for my part, think that either of these alleged causes would have a very appreciable effect on the trade of this port.
	I borrow from Mr. James Carrall's decennial report on the trade of Chefoo, a diagram showing the course of trade in cottons and yarn for the last 5 years.
	I may mention that 8¼ lbs. shirtings were selling at Chefoo in July, 1892, at 1.44 taels per piece, and at the end of 1893 at 1.80 taels to 2 taels per piece. In like manner the price of Bombay yarn rose from 55 taels per bale to 70 taels in the same interval.
No complaints in reference to trade marks.	I have had no complaints during the year on the subject of forged trade marks or of "unchopped piece-goods," <i>i.e.</i> , of goods imported without a trade mark, so that an unscrupulous dealer can, after the goods have arrived, put what mark he pleases on them. I have heard that this malpractice exists in other ports in China.
Woollens.	A decrease is likewise shown in the import of woollens, which have dropped from a total value of 91,800 Haikwan taels in 1892 to a value of 81,408 taels in 1893, but as I have said in former reports the trade in woollens at Chefoo is at the best insignificant, the people preferring furs, skins or wadded clothes to foreign woollen fabrics.
Metals.	The import of iron of all descriptions shows the same falling-off. The import of lead and steel, on the other hand, has slightly increased. Mr. Carrall in his report, mentioned above, states that the number of iron workers in Chefoo has increased from 500 hands in 1882 to 5,000 hands in 1892.
Machinery.	The import of machinery is, I am sorry to say, conspicuous by its absence. Manufacturers of machinery in England send me price lists and circulars by every mail. I wish that it were in my power to find them a market, but the Chinese merchants are too poor and too conservative to venture to buy such expensive innovations. One of the European merchants, I may mention, was applied to by a Chinese for wheat-grinding machinery, and I referred one manufacturer who had written to me, to him, but up to the present no transaction between them has taken place. If milling or other machinery, for the people, as distinct from the officials, is to be

DIAGRAM OF TRADE IN COTTONS AND YARN.



imported, it will have to be of the simplest and most inexpensive description.

In October last the steamer "Ismailia," arrived at Chefoo with over 4,000 tons of railway iron on board. They were not, however, discharged here, but at Port Arthur on the opposite coast, 70 miles from this. This material is to be used in the construction of the railway now being built in North China from Tientsin to and across Manchuria with a branch to Newchwang, which will eventually be continued to Port Arthur.

Import of
railway iron
at Port
Arthur.

About the same time the British ship "Chittagong" reported herself at this consulate. She brought 1,000 tons of cement direct from Rochester. Part of this was discharged at Wei Hai Wei, the naval station 40 miles to the eastward of this, and the remainder at Port Arthur. It was all to be used in the construction of the forts.

Import of
cement at
Wei Hai Wei
and Port
Arthur.

The steamer "Irene," a vessel specially constructed for the carriage and transport of heavy guns and machinery, with an immense derrick on her fore deck, has visited this district twice, bringing Krupp guns for Wei Hai Wei. She is expected again in April with guns for the Chefoo forts.

Import of
Krupp guns
at Wei Hai
Wei.

The enormous increase in the import of American Kerosene is noticeable. Both in 1892 and 1893 Russian kerosene has had no sale in Chefoo.

Kerosene.

Among the minor articles of the import trade, I may say that aniline dyes were imported to the value of 12,446*l.*, clocks to the value of 348*l.*, and soap to the value of 742*l.* Worm tablets and llama braid, which in many custom-house returns in China have separate headings of their own, are at Chefoo included under the head of "unenumerated sundries." So are such things as foreign bills and confectionery.

Miscellaneous
articles of
import.

I wish that I could suggest any other articles of European manufacture for which a demand could be created, but I do not know of any such. A firm of net and twine makers at Bridport wished to know what opening there was for their goods hereabouts, but I was obliged to reply that though vast quantities of fish are caught on this coast, the fishermen are too poor to buy such luxuries as foreign nets and twine.

No opening
for fresh
articles of
import.

The import of pepper from the Straits Settlements amounted to 351 tons against 144 tons in 1892. The sugar imported from Hong-Kong during the year amounted to 2,993 tons of brown, and 2,196 tons of white; more than double the amount imported in 1892. The total amount of edible seaweed from Japan dropped from 4,651 tons in 1892 to 2,101 tons in 1893.

Straits
produce.
Hong-Kong
sugar.

Seaweed.

Native Imports.

I append a table showing the total amount of native goods imported into Chefoo during the past 3 years:—

Native
imports.

Articles.	Quantity.		
	1891.	1892.	1893.
	Tons.	Tons.	Tons.
Cotton, raw	376	561	1,248
„ Shanghai, ginned	78	..	447
Paper, 1st quality	632	524	565
„ 2nd „	2,147	3,133	2,614
Rice	8,349	7,190	5,246
Sugar, brown	11,043	6,745	10,542
„ white	4,963	1,335	3,749
„ candy	531	249	300

These articles are of little interest to European merchants except for the freight which they furnish. The import of them shows, on the whole, a satisfactory increase over that of the year before, as this trade is not affected by the fall in exchange.

Shanghai
ginned
cotton.

The Shanghai ginned cotton of the above table is the cotton prepared at the mills established at Shanghai under native superintendence. The figures show that there was a considerable import of this cotton at Chefoo, and there is no doubt that it would have been larger still had not these mills been burnt down in the autumn. I do not find in the customs tables Shanghai cotton yarn, 36 tons of which were imported in 1891.

Exports.

Exports.

The following table shows the amounts of the principal articles exported from Chefoo during the last 3 years:—

Articles.		Quantity.		
		1891.	1892.	1893.
Beancake	Tons ..	73,382	68,641	57,897
Beans	„ ..	4,368	3,951	4,466
Dates, black	„ ..	395	646	591
„ red	„ ..	2,081	1,936	1,972
Fruit, fresh	„ ..	1,587	1,475	2,144
Medicines	„ ..	674	717	579
Oil, bean	„ ..	390	469	818
„ ground-nut.. ..	„ ..	217	844	..
Silk—				
Raw, white	Cwts. ..	65½	39½	32
„ yellow.. ..	„ ..	1,614	2,126	3,859
„ wild	„ ..	1,445	3,612	3,095
Cocoons	„ ..	1,285	32½	411
Refuse	„ ..	4,921	4,681	10,131
Pongees	„ ..	2,577	4,030	3,798
Straw braid	„ ..	39,523	50,439	56,908
Vermicelli	Tons ..	8,305	9,755	8,751

Of the items of the above table the only articles for European consumption are silk of all sorts and straw braid. The others are for native consumption in other parts of China.

The silk season in Chefoo may be said to begin in June, and to ^{Silk.} finish at the end of the following March. We have, therefore, to consider the trade of two seasons each year.

The trade in white silk is very small and shows no signs of ^{White silk.} development. The export of yellow silk, on the other hand, has been most satisfactory. The 1892-93 season was by no means ^{Yellow silk.} a bad one, and the crop which supplies the trade for 1893-94 was 30 per cent. above the average. Hence the immensely increased export, although the silk crop in Italy, the principal rival of North China, is also 30 per cent. above the average. We shall no doubt see this increase continued during the spring months of 1894. Most of the yellow silk is destined for the Paris market.

During the autumn, a French silk inspector spent some time in ^{Visit of silk inspector to inland markets.} the interior buying silk and watching the markets at Ching Chou, Tsou Ping, and elsewhere. He reports that markets for the sale of silk are held in these towns once every 5 days, and that in the interval between the markets, the prices of the last market are accepted as the standard of value. He was civilly received everywhere, but his appearance in any market promptly occasioned a rise of prices, as is perhaps natural. I feel sure that the presence of a European "pioneer of commerce" up country is good for trade, and I should be glad to see others following his example.

The export of raw wild silk, the brown silk made by silkworms ^{Wild silk.} feeding on oak trees, has fallen from 3,612 cwts. in 1892 to 3,025 cwts. in 1893, a decrease which will be found in the 1892-93 crop. The 1893-94 crop will show an increase. I mentioned in last year's report that the autumn crop which would go forward in the spring of 1893 would be inferior. It proved so both in quality and quantity. During the first 6 months of 1893, 2,143 cwts. were exported against 2,630 cwts. the year before, a decrease of 487 cwts. As the decrease of the whole year is 517 cwts., it would appear that there is also a decrease of 30 cwts. in the autumn crop, but experts tell me that it has been late in coming to hand, and that the crop of the whole season will be considerably larger than that of the season before.

Cocoons too were not fairly on the market at the end of the ^{Cocoons.} year. Of the 411 cwts. exported during 1893, about 50 cwts. belong to the spring crop, which as I said in my last report was irremediably injured by a storm of hail in the autumn of 1892.

The export of refuse silk has gone up with a bound. There ^{Refuse silk.} was a large crop of this in Shantung, to say nothing of the refuse silk which reached us from the Manchurian Peninsula.

The quality of pongees this year has been inferior and light. ^{Pongees.} If the Chinese would pay more attention to producing a better fabric this trade would be enormously increased.

The export of straw braid shows an increase of about 12 per ^{Straw braid.} cent. over that of 1892. The chief thing to be noticed in reference to this trade is that this year, for the first time, split straw braid

Introduction of split straw braid.	has been made and exported. Straw splitting tools, as used in England, have been imported. The plaiters have soon got used to them, and have made native imitations of them. The manufacture of split straw plait seems at first sight a trifling matter, but it is hoped and expected that the innovation will have a great effect in increasing and developing the straw braid industry.
Officials interested in straw braid trade. A straw braid exchange needed.	Our present Taotai, or Intendant of Circuit, takes a great interest in this trade, realising that it affords a living to so many poor people in his district, as well as bringing him a revenue. I hope that he will be able to help us. What seems to me needed is something in the shape of a straw braid exchange or guild, where responsible Chinese managers, who know where the people are to be found, who can copy any pattern given to them, would undertake to see to the proper execution of orders and the proper supply of the market. This institution need not necessarily be in Chefoo itself, where it might not impossibly meet with opposition from merchants desirous of keeping the details of their business from the knowledge of their rivals. If such an institution were in good working order, I feel sure that the straw braid trade could be greatly developed. As it is, one of the merchants told me that he can only fulfil one-third of his commissions. The other two-thirds he has to let go owing to the apathy of the Chinese dealers. They are dependent on the plaiters. Straw braid making is emphatically a "petite industrie." The plait is made at home by peasant women and girls of the stupidest and most ignorant class. It must be difficult to rouse such to any desire of improving their handiwork.
Beans and beancake.	Beans, the principal staple of export to other Chinese ports, are harvested in the autumn, but the export of them and of their products, bean-cake, bean-oil, and vermicelli, goes on through the year. The harvest in 1892 was only moderate, but the export of the first few months of 1893 was not far below the average. The crop of 1893 was scanty and deficient owing to the drought of last summer. Consequently, there has been a falling off, especially in the export of bean-cake.
Vermicelli.	I am told that the Chinese have lost considerably over the vermicelli trade, as the markets in South China are over-stocked, and the prices here have fallen considerably.
Fruit.	There is an increase in the export of fresh fruit. I noticed last summer that the Japanese steamers running to Corea, Japan, and Vladivostock had their decks crowded with baskets of fruit on leaving Chefoo.
Minerals.	I have little to say about the export of minerals, which are still absent from the list of exports. I will say something about gold later on under the head of "Treasure."
Mining at a standstill.	The members of the syndicate to work lead mines at Tzu Ch'uan and coal mines at Chang Chiu have turned their attention elsewhere, and are, I believe, seeing what can be done in the province of Chihli. I hear nothing now concerning their operations in the western part of Shantung. One of the members of the syndicate wrote to me from Tientsin last spring to say that they were about to make

terms with the gentry of the district, and that work would then begin, but I fear that he was over sanguine. Until communication is improved I cannot think that a mine in the interior of Shantung can pay expenses.

Mr. Corral in his decennial report mentions the existence of Diamonds. diamonds at Yi Chou Fu in this province. I tried to procure a specimen of these. I bought for half a dollar an infinitesimally small grain of something hard, which I was told was a diamond, but it was too small for anyone to make out what it was without a microscope. If the district can produce nothing better there is no fear of its rivalling Golconda.

Shipping and Freight.

The total number of vessels which entered Chefoo in 1893 was Shipping. 1,236 with a tonnage of 1,015,870 tons against 1,308 vessels of 1,073,885 tons the year before, a decrease of 72 vessels and 58,015 tons, due mainly to the fact that both Tientsin and Newchwang were late in opening, so that most of the coasting steamers did one trip less than usual.

The tonnage is thus divided:—

Nationality.	Steam.		Sailing.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	559	509,672	18	10,405	577	520,077
German	113	82,915	11	4,766	124	87,671
Swedish and Norwegian	3	2,212	4	1,166	7	3,368
Russian	17	11,028	...	...	17	11,028
Japanese	58	53,578	...	...	58	53,578
Chinese	453	340,148	...	...	453	340,148
Total	1,203	999,553	33	16,317	1,236	1,015,870

The decrease of British tonnage as compared with that of the year before is 55,271 tons, and of Chinese 11,829 tons, German tonnage on the other hand shows an increase of 6,152 tons, and Russian tonnage an increase of 4,849 tons. The amount of Scandinavian and Japanese tonnage is almost identical with that of the year before. No Dutch nor American vessels entered Chefoo in 1893.

Increases and decreases.

The number and tonnage of sailing vessels visiting Chefoo grows smaller and smaller year by year. The falling off for 1893 as compared to 1892 is 7 ships and 2,207 tons.

Decrease in sailing vessels.

A combination between the principal coasting steamer companies, with an agreement that no company shall charge less than the others, still continues. Consequently high rates of freight and passage are still in force.

Continuation of the steamer companies combination.

I am glad to say that I have no shipwrecks to report. The only casualties that occurred during the year were two. The Chinese steamer "Chintung" stranded on a sandbank at the

Casualties. Steamship "Chintung."

And
steamship
"Whampoa."

entrance of Chefoo harbour, but got off again without injury. The British steamer "Whampoa" ran on the south-east promontory in a fog, and was fixed on a reef of rocks, whence she was rescued with considerable difficulty.

Friendly
behaviour of
Chinese
officials.

I have much pleasure in recording the good offices both of the Taotai of Chefoo, who sent a military officer and some soldiers to the scene of the wreck to keep order, and of Admiral Ting, the Commander-in-Chief of the Northern Squadron, who also sent a man-of-war thither.

Native
passengers.

The natives of this province show that every year they are making more use of steamers as the best mode of conveyance. I append a list of Chinese passengers who travelled in steamers and war vessels to and from Chefoo during 1893.

TABLE of Native Passengers.

	Number of Passengers from Chefoo to—	Number of Passengers to Chefoo from—
Newchwang	29,952	15,986
" in war vessels ..	5	1
Tientsin	13,082	9,913
" in war vessels ..	108	108
Shanghai	2,880	2,208
" in war vessels ..	5	8
Corea	3,138	1,944
" in war vessels ..	4	67
Port Arthur	4,154	1,289
" in war vessels ..	3,228	8,342
Wei Hai Wei	179	76
" in war vessels ..	2,161	2,432
Amoy	15	120
Shih Fao in war vessels ..	45	9
Yang Chio Kou	116	333
Lai Chou	1,554	903
Hong-Kong	140	75
Japan	573	386
Vladivostok	13,437	648
Swatow	113	..

Warships as
passenger
steamers.

The employment of war vessels as passenger steamers, strikes Europeans as very extraordinary. The war vessels employed for this purpose are principally the smaller gun vessels of the Northern Squadron, which are constantly going to and fro between this and the naval stations of Port Arthur and Wei Hai Wei. Passenger tickets for passages on board men-of-war are to be bought at the Imperial Telegraph Office.

Overcrowding
of steamers.

I would call attention to the number of passengers to and from Newchwang, Tientsin, Port Arthur, and Vladivostok. Every spring there is a rush of emigrants from this province to those places, where a number of them work during the summer and return in the autumn with their wages. Consequently, the out-

ward bound steamers in the spring, and the inward bound steamers in the autumn are often terribly overcrowded, and I fear that some day there will be an accident causing great loss of life. I saw the "Kwang Chi"—a steamer of less than 300 tons—leave for Port Arthur last spring with nearly 1,000 passengers on board, and if she had capsized in harbour I should not have been surprised. She is a Chinese steamer, and Port Arthur is only 70 miles distant, and of course I could not interfere. Neither can I interfere with the steamers running to Newchwang, although they are under the British flag, for, so far as I am aware, there is no law which authorises a Consul to regulate coasting traffic between two foreign ports. I did, however, endeavour to bring British steamers running to Vladivostock under the provisions of the Chinese Passengers' Act of 1855, according to which all British vessels carrying over 20 native passengers from a port in China to any place distant more than seven days' journey, are under certain restrictions. During the months of March and April, the following steamers left Chefoo for Vladivostock with coolie emigrants.

Attempt to bring voyages to Vladivostock under "the Chinese Passengers' Act."

TABLE of Emigrants to Vladivostock.

Vessel.	Nationality.	Registered Tonnage.	Number of Coolies Carried.
"Novick"	Russian ..	156	200
"Wladimir"	Russian ..	715	650
"Ise Maru"	Japanese ..	771	1,352
"Higo Maru"	Japanese ..	871	1,300
"Baikal"	Russian ..	713	800
"Kowshing"	British ..	1,355	2,000
"Satsuma Maru"	Japanese ..	1,157	1,583
"Vladivostock"	Russian ..	678	350
"Wo Sang"	British ..	1,127	800
"Ise Maru"	Japanese ..	771	1,100

The figures are taken from the customs returns. They are no doubt only approximate in some instances, but the error is more likely to be understating the number of passengers than overstating it.

The lighthouse at Lao Tieh Shan, on the promontory on the coast of Manchuria, opposite Chefoo, was lighted last summer. It is the finest light on the coast of China, and will be a great boon to navigation in these waters. A steam siren has been added to the lighthouse on the north-east promontory.

Dues and Duties.

I give the following table of dues and duties taken from the customs returns :—

Dues and duties.

DUES and Duties Paid at the Imperial Maritime Customs at
Chefoo during the Year 1893.

Description.					Amount.
					£
Import dues	..	..	..	..	11,787
Export dues	..	..	..	..	35,067
Coast trade duties	..	..	..	..	7,955
Tonnage dues	..	..	..	..	3,130
Transit dues	..	..	..	..	..
Opium duties	..	..	..	..	1,782
Opium likin	..	..	..	..	4,746
Total	..	..	..	..	64,467

Or 368,381 taels, against 337,535 taels in 1892. This is the largest amount of duties ever received in Chefoo in one year.

Of the amount levied in 1893, 154,012 taels (26,952*l.*) were paid under the British flag.

Treasure.

Treasure. During 1893, treasure to the amount of 204,881*l.* was imported, and was exported to the amount of 390,650*l.* Of the imports, 14,300 taels (2,502*l.*) were in gold bars from Corea, and 825,393 taels (144,444*l.*) were exported in gold, an amount which is 26,323 taels in excess of the gold exported the year before.

Gold at Chefoo. The low price of silver has no doubt brought all the gold that can be scraped together into the market, but it certainly is rather a mystery whence it all comes. The gold of China is, of course, uncoined, though it is made up into small bars worth some 40*l.* apiece. I am told by the Chinese that the gold bars in circulation at Chefoo come from three different sources—(1) from the Amoor River valley; (2) from Corea; and (3) from the gold mines and washings in the Shantung province itself. Besides these, I have little doubt that a large proportion of the gold now in use comes from the hoards of Chinese, where it may have lain for years in the shape of bangles and ornaments, but is now tempted out by the low price of silver, which is after all the medium of exchange and the standard of value in the trading places of China. In many of the poorer districts copper cash takes its place. Mr. Consul Jamieson, in his valuable report, No. 305, on the silver question, has shown that the annual export of gold bullion from all China has risen from 1,678,000 taels in 1888, to 7,332,000 taels in 1892. The export of gold from Chefoo has followed this ratio.

Whence it comes. Neither Amoor River gold nor Corean gold need be taken into consideration here. The amount of the former at Chefoo can scarcely be appreciated, and Corean gold will doubtless receive its proper notice in the trade reports on Corea, but I would like to add a word or two to what I have said already in other reports on

Hoarded gold produced.

Gold mines in Shantung.

Shantung gold. Some Chinese who have been in California, stimulated no doubt by the low price of silver, and consequent high price of gold, have got together a joint stock company to open a gold mine at Chao Yuan. His Excellency Li Hung Chang, the Superintendent of Trade at the Northern ports, has granted them the necessary concession on condition that they should make themselves responsible for the debts of the P'ing Tu Mining Company, said to amount to 300,000 taels. Tentative works have been going on. I was told a short time back that bars of gold to the weight of 8 lbs. had been extracted thence. I am also informed that one of our European merchants is commissioned to procure the company the dynamite required for blasting purposes at these mines. I conclude from this that work is going on, but I can only regard the enterprise as being in the experimental stage, on the success or failure of which it is too early as yet to express an opinion.

The other two gold-producing districts in this neighbourhood are P'ing Tu and Ning Hai. Nothing is being done at P'ing Tu. Ning Hai is a place where alluvial gold is found in the sands of the streams. When farming and other work are at a standstill, especially in winter time, the peasants set to work gold washing, for want of something better to do, and earn a few pence per day by collecting gold-dust in infinitesimal quantities. This dust seems to be made up into bars before it is exported, for neither the custom-house officials nor the steamer agents know of any treasure exported in the shape of gold-dust.

As I said a little way back, copper cash forms the currency of the poorer districts. The workmen at the lighthouse at the north-east promontory declined to take their pay in silver, and 1,000,000 copper cash, weighing $4\frac{1}{2}$ tons, had to be taken thither to pay them 120% in wages. The decreased value of silver has brought down the exchange to 960 cash per dollar, which is lower than I have ever known it before in any part of China, but I have not heard that the fall has had any appreciable effect on trade.

General Remarks

The most important advantages which we have gained during the past year are increased communication and trade with the coast of Manchuria, and improvements in landing and shipping cargo, owing to the introduction of a steam-tug and iron lighters. To these I may add the establishment of a General Purposes Committee, from whose existence we may hope for much good work for the public benefit.

I have mentioned in previous reports the steamer "Kwang Chi," a vessel of between 200 tons and 300 tons, the property of Sheng Hsüan Huai, formerly Taotai here, now Taotai at Tientsin, which runs to the various non-treaty ports in these waters. She acts as a feeder to the steamers of the China Merchants Steamship Compaay, and proves of the greatest benefit to foreign trade.

Her work
during the
year.

Her usual voyages are westward from Chefoo to Yang Chio Kou, a port at the mouth of the Yellow River, and back, calling at Teng Chou, Hu T'ou An, the port of Lai Chou, and Lung Kou en route, but in addition to this, in the early spring and late autumn, she goes across to Port Arthur or Ta Tung Kou, both on the Manchurian Coast. I append a résumé of the work she has done during the year, for which I am indebted to the Commissioner of Customs. She began running in March, and ran until the end of the year.

Voyages of the Steamship "Kwang Chi" in 1893, with the Import and Export Cargo carried by her.

Statistics
of the work of
the steam-
ship "Kwang
Chi."

30 trips to Yang Chio Kou, taking thither 1,314 packages of piece-goods, 1,034 packages of yarn, 4,815 packages of other merchandise, and 13,000 taels of sycee silver. Bringing thence 5,232 packages of mats, 4,295 packages of waste silk, and 385 bales of yellow silk. On these trips she called at Lung Kou, carrying thither 2,033 packages of merchandise.

33 trips to Lai Chou, taking 1,429 packages of piece-goods, 9,038 packages of cotton yarn, 861 packages of other merchandise, and 167,000 taels in sycee silver. Her return cargoes comprised 333 boxes of native opium from Lai Chou, and from those ports abovementioned (the customs statistics do not specify the original port of export) 1,566 packages of merchandise, and sycee silver to the value of 64,250 taels.

8 trips to Port Arthur, on the coast of Manchuria, whence she brought 600 packages of silk.

1 trip to Tatung Kou, whence she brought 1,000 packages of cocoons.

The number of passengers which she carried may be gathered from the table included under the head of shipping.

First visit to
the new port
of Ta Tung
Kou.

Ta Tung Kou is a port which will not be found on the maps. It is on the coast of Manchuria between the Regent's Sword Peninsula and Corea, in about longitude $124^{\circ} 10' E.$, and latitude $39^{\circ} 40' N.$ The country thereabouts is well wooded, and junks often call there for timber. I do not know whose idea it was to send the "Kwang Chi" thither, but her journey was a success, as in addition to the 1,000 packages of cocoons she brought 101 passengers backs. It is possible that the cocoons might eventually have found an outlet, either by way of Newchwang, or by Port Arthur, but it seems to me that a new tract of country has been thus opened to foreign trade, and that Chefoo has been brought into contact with markets that had hitherto been closed to it. Another point should be noticed. The North China Railway is to come down the Manchurian Peninsula to Port Arthur, which will give a great impetus to traffic. If Port Arthur should be closed to trade, Ta Tung Kou is hard by ready to take its place as a commercial port.

I have in former reports pointed out the disadvantages under which the shipping trade of Chefoo labours, because there is here no pier or back water, at which, or behind which ships can load or discharge, when rough weather prevents cargo boats working in the harbour. To facilitate the landing and shipping of cargo, the agents of the two principal British Steamship Companies invested in a steam-tug and some large iron lighters. Thanks to these steamers have been able to discharge and ship cargo on many days on which work would otherwise have been impossible, for the tug and lighters have been able to cross the harbour to steamers lying under the bluffs, where other cargo boats could not reach them.

For some years past there has been at Chefoo a committee of European residents who have made it their business to keep the roads of the European quarter in good order, and to look to the lighting and cleansing of them, but beyond this we have had no municipal council of any kind. We have been dependent for many years on the Shanghai Local Post, which is under the control of the Shanghai Municipal Council, as our post office. This office used to charge Shanghai consulates and mercantile firms so much per year, and residents in Chefoo used to send their letters to the steamer agents, or on board the steamer, and on arrival in Shanghai the master would send the mails to the local post, which would distribute them. No postage was paid at this end. In 1893, the Shanghai Municipality decided to abolish the system of annual subscriptions, and to charge postage on each cover which passed through their hands instead. This obliged the residents of Chefoo to invest in a stock of Shanghai stamps. It struck some members of this community that it would be as well to get their letters made up into mails instead of having them lying loose in the steamers' letter boxes, and that it would be advisable to have their own stamps, and to spend on postage in Chefoo the money which they would otherwise have been forced to spend on the same in Shanghai. An arrangement was accordingly made with the Shanghai Municipal Council that the post office at this end should deliver free all letters stamped by the Shanghai Local Post Office, on condition that the Shanghai office should in return deliver free all letters stamped at the Chefoo office. A committee was appointed, and the office was got into working order in June last. In 6 months 27,749 covers of various descriptions have passed through the office, and a clear profit of over 1,200 dol. has been shown, a profit partly due, I am bound to say, to the enthusiasm of stamp dealers and collectors, who have bought up hundreds of local stamps as specimens. The members of the community encouraged by these results have decided to amalgamate the road committee and the post office, and of the two to form a General Purposes Committee, which is a Municipal Council under another name. I think that such a body in Chefoo will find plenty of useful work to do.

I repeat here what I have already urged "ad nauseam" that the chief requisite for the improvement of the trade of Chefoo is better communication with the interior. As roads are things of

(1742)

B

Introduction
of a steam
tug and iron
lighters.

The Chefoo
road com-
mittee.

The Chefoo
local post.

Success of
the Chefoo
local post
office.

Amalgama-
tion of Road
Committee
and Post
Office forming
a Municipal
Council.

Need of
better com-
munication
with interior.

the future and railways things of the distant future, what we want now is more steamers of the "Kwang Chi" type to do the same work as she does. Mr. Carrall gives the total cost of the carriage of a bale of yarn from Chefoo to Lai Chou by the s.s. "Kwang Chi" as 65 tael cents. By land carriage he says that it would come to 2-10 taels, more than three times as much. Similarly the transport of silk refuse from Lai Chow by steamer costs 30 tael cents. per bale, by land 80 cents., and other goods in proportion.

When one passes through the inland sea of Japan, little steamers are everywhere to be seen running from Japanese ports, which Europeans have scarcely heard of, to the treaty ports. The same thing is to be seen in the Straits of Malacca. The harbours of Penang and Singapore are full of small steamers trading with the native States, and acting as feeders to the ocean-going steamers voyaging to Europe or America. This is what we need here. I think that the Taotai perceives the advantage of small steamers.

There is talk of four or five such being started in these waters. An official from Port Arthur assured me that two steamers were certainly going to be procured. A retired official at Chinanfu has petitioned the provincial authorities to allow him to run a steamer for Lai Chou to Tientsin, calling at the mouth of the Yellow River and other places en route, but up to the present he has not been able to obtain the requisite permission. No doubt the monopoly of steamer trade on the coast and rivers of China, which has been given to the "China Merchants Company," stands in his way. Even the "Kwang Chi" and the collier steamers which carry Kaiping coal are under the control of the managers of the China Merchants Company, who are naturally suspicious of any encroachment on their privileges and profits. Moreover, the curious fiscal system of China with one custom-house levying dues on junk-borne cargo, and another deriving its revenue from the cargo of steamers and foreign-built sailing ships, and each of them jealous of the other, forms another serious obstacle to the use of steamers at non-treaty ports. Still, a man of our Taotai's influence is quite in a position to overcome just such difficulties, and I trust that he will do so.

As regards land communication with the interior, I am glad to be able to report that there is considerable improvement in the military road to Wei Hai Wei. Although it has not been metalled, its gradients have been made easier where necessary, and bridges have been built over the water courses which it crosses. A few days ago I saw a string of 12 carts going along it in the direction of Wei Hai Wei, and was told that they had come from Chinanfu. The year before pack mules alone could have made their way there. Brigadier-General Sun told me lately that he was about to have this road metalled. He also remarked that in the western part of Shantung carts were regularly used, but that in only three-tenths of the whole province carts were the ordinary means of conveyance, and that he found it hard to extend the use of them to the other seven-tenths of Shantung. A few camels from the Chihli province come with loads to Chefoo in the winter. They are only allowed to

By means of small coasting steamers.

Example of Japan and the Straits to be followed.

Possibility of more steamers being procured. Abortive attempt of official at Chinanfu to run a steamer.

Land communication with interior. Improvement in the military road. Increased use of carts.

travel at night as the mules are afraid of them. But little improvement has been made in the roads from Chefoo westward. Carts can make their way along them, but the bulk of the traffic is carried on by means of pack mules and donkeys. Travellers are borne in mule litters swung between two mules. Mr. Carrall estimates the number of pack animals entering Chefoo daily as 3,000. Roads to the westward.

The Taotai, when serving at Port Arthur, had waterworks constructed to supply the garrison with drinking water, it is hoped that he will do as much for Chefoo, where water, which could easily be supplied, is greatly needed. A scheme drawn up by the French engineer, who designed the Port Arthur Waterworks, has already been submitted to him. The difficulty of finding the necessary funds will have to be overcome. Projected waterworks at Chefoo.

Nothing has as yet been done to improve the harbour, or to provide a breakwater of any description. Nor has any beginning been made of a bund or esplanade in front of the town, as was once suggested. No harbour improvements.

The year 1893 has, on the whole, been a prosperous one for the Shantung province. Quiet has prevailed everywhere, and the Yellow River, for a wonder, has not overflowed its banks. The summer rains seem to have been caught by the mountains of Chihli, for while that province has suffered from floods, there has been a deficiency of rainfall in this. The weather of 1893.

The increase of the trade with Russia, especially in the emigration traffic to Vladivostock, has induced the Russian Government to station a commissioned Vice-Consul at Chefoo, instead of entrusting their interests to a British merchant, as heretofore. The first incumbent of the post has taken charge while this report has been in preparation. Establishment of a Russian Vice-Consulate.

The spring or wheat harvest was very good, but the more important autumn harvest of maize and millet suffered from drought. The bean harvest, too, was below the average. Up to the date of the despatch of this report there has been but little snow, which will, I fear, have a bad effect on the first harvest of 1894. Harvest.

The following table taken from Mr. Carrall's report shows the population of Chefoo, according to the Chinese census. It must not be taken as absolutely correct, but I expect that it is sufficiently accurate to give a fair idea of the numbers and composition of the population. Census of Chefoo.

POPULATION of Chefoo.

Description.	Number.	Number of Persons.
Shops, oil factories, &c.	1,660	9,620
Lodging-houses.. . . .	50	260
Opium divans	132	320
Brothels.. . . .	245	745
Private residences	435	2,175
Employés in custom-house and yamens	..	350
Natives in foreign employ	..	230
Scholars and literati	..	250
Hawkers	..	5,500
Boats, with two boatmen in each	1,200	2,400
Coolies and labourers	..	10,650
Total	..	32,500

A large proportion of the classes described as hawkers and coolies might equally well be described as mendicants and beggars. There are a number who can scrape a living in the summer months, but are dependent on the Kuang Jen T'ang Benevolent Institution, or on private charity in the winter. It is a curious fact that the greater number of the lower classes in Chefoo are not natives of it. They come from the interior of the province to find work here, leaving their wives and families behind. I do not think that I have a single servant in this consulate who is a Chefoo man. No doubt it is because the population of Chefoo is so unsettled and fluctuating that the number of opium divans and brothels is so large, and the number of scholars so small.

Number of
Europeans.

The European population is estimated at 170 living at Chefoo, and 200, principally missionaries, in other parts of the district.

Health of
the year.
Chefoo as a
health resort.

I have 270 persons registered as British subjects in my books. The health of the year has been good, though there have been a few cases of typhoid fever. The hôtels and lodging-houses were well filled with visitors during the summer months, and the number of pupils at the boys' and girls' school continues to increase.

Thanks to the
Commissioner
of Customs
and Mr.
James
Carrall.

I have, as usual, to record my thanks to the Commissioner of Customs for giving me access to the customs statistics. I must also not fail to express my obligation to Mr. James Carrall, formerly Commissioner of Customs here, for the use of his valuable and interesting decennial report on Chefoo, on which I have largely drawn.

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AND FINANCE.

CHINA.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF SWATOW.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1202.

*Presented to both Houses of Parliament by Command of Her Majesty,
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CHINA.

SWATOW.

Consul Scott to the Earl of Kimberley.

My Lord,

Swatow, April 23, 1894.

I HAVE the honour to enclose my Report on the Trade of Swatow for the year 1893.

I have, &c.

(Signed) B. C. GEORGE SCOTT.

Report on the Trade of Swatow for the Year 1893.

ABSTRACT of Contents.

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Sterling
equivalent of
currency.

For the purposes of this report the average value of the Haikwan tael for 1893 has been taken as being 4s., its real value having been a fraction of a penny under that amount; for 1892 the same value of 4s. was also taken, but it would appear that this was about $4\frac{1}{4}d.$ too low. Except for the purpose of comparison the sterling value of the trade of Swatow has no great significance, for, with the exception of cotton and woollen goods, kerosene oil, and metals (representing last year a value of about 5 per cent. of the total trade), the whole trade of the port, foreign and native, is transacted with countries having a silver currency.

Total trade.

The total trade of the port, export and import, in 1893 was 4,969,530*l.*, against 4,910,226*l.* in 1892, an increase of 59,304*l.* This advance is to be credited to imports, the exports showing a falling-off. The figures are:—

IMPORTS.

Year.						Value.
						£
1892..	..	..	..	..	..	3,497,419
1893..	..	..	..	..	..	3,618,606

an increase of 121,187*l.*

EXPORTS.

Year.						Value.
						£
1892..	..	..	..	..	..	1,412,807
1893..	..	..	..	..	..	1,350,924

a decrease of 61,883*l.*, thus showing a net growth of the total trade of 59,304*l.* as above.

Shipping.

Shipping.

The total shipping of the port during 1893 amounted to 1,834 vessels entered and cleared, of a total tonnage of 1,767,390 tons. Of these 1,630 vessels, of 1,575,966 tons, were British; 112 vessels, of 117,310 tons, were Chinese vessels of foreign type; 64, of 54,308 tons, were German; 16, of 10,204 tons, were Japanese; 6, of 4,740 tons, were Swedish and Norwegian; 4, of 2,688 tons, were Dutch; and 2, of 2,734 tons, American.

Two sailing vessels only, one British and one American, of 1,631 tons and 1,087 tons respectively, were engaged in the trade. Both arrived with kerosene oil direct from America, and both left in ballast.

During the year steamers arrived with direct shipments of kerosene oil from Batoum; all others arrived from, or cleared for, Hong-Kong, the Straits Settlements, Sumatra, Java, Japan, or Chinese ports.

The freights by the steamers of the three large local companies, the China Navigation Co., the Indo-China Steam Navigation Co., and the China Merchants Steam Navigation Co., being regulated by a tariff agreed upon between them, underwent, I am informed, no important change during the year, and were, no doubt, fairly satisfactory, as few "outside" steamers took any part in the regular import and export trade, apart from the passenger traffic and the trade between Hong-Kong, Amoy, Foochow, and Formosa. Freights.

The freight earned by the steamers of the above companies from Newchwang, the trade thence being worked by charter, was, on the other hand, only moderately satisfactory. At the opening of the season a rate of 24 c. a picul (133½ lbs.) was obtained, and this fell to 14 c. by the end of June, where it remained till towards the close of the season, when it again rose to 25 c. and 24 c. From Chefoo, only 24 hours from Newchwang, where the steamers from that port called to fill up, rates only rose to 14 c. a picul during the year, and fell as low as 9 c. and 10 c.

The carrying trade of the port, both import and export, between Hong-Kong on one side and Amoy, Foochow, and Formosa on the other, is almost entirely in the hands of the Douglas Steamship Co., and, judging by the dividend paid, was very satisfactory.

A decrease in the total amount of shipping occurred during the year, amounting to 69 vessels entered and cleared, of 70,337 tons, or rather less than 4 per cent. British shipping decreased by 56 vessels, of 57,770 tons; Chinese shipping by 12 vessels and 436 tons; Japanese by 5 vessels and 4,185 tons; while German shipping increased by 10 vessels and 6,246 tons. That there should have been an increase only in German shipping is rather a sign of the times. The presence, however, of so large a proportion of German tonnage at Swatow is accounted for by the virtual monopoly enjoyed by German merchants resident here in the very profitable passenger traffic with Deli, in Sumatra.

Only one casualty to shipping occurred in this district during the year, the total loss, some 10 miles south of Breaker Point (about 60 miles from Swatow), of the British barque "Florence Treat." Wreck.

The "Florence Treat" was laden with timber from Singapore to Shanghai, and was caught in a typhoon on the night of September 8. Of the 23 persons on board, including the master's wife and family, only three were saved—a Malay, a Chinese, and the master's second son, a boy of 10, who probably owed his life to the cork belt his father, Captain Poulsen, tied on him just

(1788)

A 3

CHINA.

before the ship struck. 'The number of Europeans lost, including Captain Poulsen's children, was eight.

Exports.

Exports.

The total native produce of local origin exported during the year amounted, exclusive of re-exports, to 1,289,137*l.*, as compared with 1,363,616*l.* in 1892, a decrease of 74,479*l.* This is due entirely to the falling-off in the export of sugar—the mainstay of the export trade. The decrease in this one article was rather more than 100,000*l.*, but although there was a decrease in native cloth and tea, the increase in grass-cloth, oranges, paper, tobacco, and sundries reduced the net decrease to the sum above-mentioned.

Sugar.

The total amount of sugar exported was, roughly, 135,000,000 lbs., valued at 625,000*l.*, as against 158,000,000 lbs., valued at 725,938*l.*, in 1892, the growers' prophecy that there would be a serious deficiency in the crop for 1892-93 being thus fully verified. An insufficient rainfall in 1892 after the young canes were planted, coupled with the almost unprecedented severity of the frost in the middle of January, 1893, which greatly injured the canes just before reaching maturity, were undoubtedly the main causes of the shortness of the crop. It is anticipated that the injury caused to the young canes planted in the spring of 1893 for the 1894 crop by the typhoon in September last, although the acreage under cultivation has been greatly extended, was so serious that the export for 1894 will not exceed 100,000,000 lbs.; this is, however, in all probability a very pessimistic view of matters. The prices realised by the growers in 1893 were very good, and sugar-growing is so profitable, on the whole, that it is stated that the area devoted to this crop has been so extended as to curtail the acreage devoted to growing rice; a very large increase of the import of this cereal is accordingly anticipated for 1894.

Of the less important articles of export, native cloth shows a decrease in value, as also does tea, which is exported entirely to Hong-Kong, Cochin-China, Siam, Singapore, &c., for the use of Chinese residents there. On the other hand, grass-cloth, oranges (196,000 cwt. against 182,000 cwt. in 1892), joss-paper, and tobacco all show an increase, and but for the serious decrease in the export of sugar the result of the trade for the year would have been very satisfactory.

Import Trade.

General

The gross value of the import trade during 1893 was 3,618,606*l.*, as against 3,497,419*l.* in 1892, an increase of 121,187*l.*, and this, notwithstanding a very serious falling-off in most of the principal articles of import, the position being saved by the greatly augmented import of rice, paddy, and wheat.

There has been a serious decrease of rather over 100,000 lbs. Opium. in the import of opium in 1893 as compared with 1892. The cause of this decrease is obscure; the most likely suggestions made are the increased consumption of Ssü-ch'üan opium, and the temporary depression of the districts supplied from Swatow through floods, drought, and cold. The question of the silver exchange with India may also, it is suggested, have had some influence on the market here, but this does not seem very probable, as, though the decrease for the three-quarters ending September 30 was 253 piculs (133½ lbs.), 248 piculs, and 329 piculs respectively, the December quarter showed an increase of 61 piculs as compared with the same quarter of the previous year. There is no doubt that a very large quantity of opium has of late years been introduced into this province by Chinese junks direct from Singapore; what the quantity is it is impossible to say, but there is no doubt that it is very large, and that it has hitherto escaped the import and likin duties of 110 taels per picul.

During the last quarter, however, the foreign customs at the port of Kiungchow, in the island of Hai-nan, for the first time took cognisance of this opium and collected import duty and likin on it. Kiungchow is, no doubt, one of the chief ports of entry for junk-borne opium, and it seems possible that the putting of this opium on a level with that carried from Hong-Kong by steamer may have been the, at any rate partial, cause of the sudden cessation in the decrease of the trade here. The trade is entirely in the hands of the Chinese merchants, and, except that opium is brought from Hong-Kong in foreign steamers, foreign merchants have no interest in it.

The total amount of the various descriptions of cotton piece- Cotton goods. goods imported in 1893 was 342,531 pieces, valued at 152,305L., against 384,649 pieces, valued at 157,362L., in 1892, thus showing a diminution of about 10 per cent. in quantity, and about 3¼ per cent. in value as laid down here.

The following table shows the comparative import of the principal cotton piece-goods for the last 3 years:—

Articles.			Quantity.		
			1893.	1892.	1891.
Shirtings	Pieces ..		253,366	279,338	378,417
T-cloths. . . .	" ..		55,001	71,032	78,715
Turkey reds	" ..		7,399	7,726	9,702
Towels	Dozen ..		9,786	12,576	9,184
Japanese cotton cloth ..	Pieces ..		12,283	9,801	10,429

There has thus been a heavy fall in shirtings and T-cloths, by a great deal the most important cotton goods imported. Exchange has doubtless played a principal part in the decline, especially during the year just closed, but other causes have

probably also been at work, among them it can scarcely be doubted, the yearly increase (until last year) in the import of cotton yarn. Fashion, too, probably plays its part in the case of the minor imports, as the increase in the towel trade noticed last year by Mr. Wilkinson, and by him (no doubt, correctly) attributed to a new taste in dress rather than to increased cleanliness, has not been maintained, the import having fallen from 12,576 dozens last year to 9,736 dozens. Turkey red cottons also show a slight falling-off. In Japanese cotton cloths there has been a substantial proportional increase of rather more than 2,400 pieces. This increase may possibly be credited to the fact that Japan is a silver using country, but at the same time the cheapness of these cloths and their increased popularity must be taken into account.

Mr. Wilkinson's question whether cotton cloth could not be woven so as to be subsequently "divisible down its centre; in other words, could two pieces of Chinese breadth be simultaneously produced from the same loom," seems almost to have been a prediction as well as a question, for, but a few months after his report was published, I received a prospectus issued by the Multiple Inner Selvage Machine Company for the manufacture and sale of a machine recently invented and patented, the object of which is to enable manufacturers of textile goods "to weave any number of pieces of cloth of any varying widths up to the full capacity of the loom at the same time, each width to have fast and perfect selvages (not juped) from the same warp and weft." The prospectus further states that "the machine can be fixed or removed in a very few minutes without in any way altering or interfering with the character or construction of the loom."

It has, I believe, for many years been held that, if Manchester goods could only be produced of the same width as Chinese native cottons, a great development lay before the foreign piece-goods trade. This can now, if the multiple inner selvage machine is capable of doing all that is claimed for it, apparently be done; but whether the development of the trade prognosticated will take place is another question. An experienced piece-goods merchant to whom I referred the prospectus, remarks: "If the invention enables the looms of Lancashire to weave a narrow cloth of stout 'low count' yarns, such as Chinese are accustomed to, and to do the work economically, the invention may be of practical use in the China trade, but I believe that much of the native weaving is done by the country people in their spare time, between crops, &c., and the cost of producing must be very small. There will probably be an outlet for the machine in Indian mills." There are, no doubt, other points, such as the nature of the fabrics woven, but the main question at the present time is one of cost, and it seems unfortunate that this invention should have become perfected, supposing such is really the case, at a time when exchange is so against British manufacturers, and the competition of India, Japan, and even China itself has become so serious; 10 or 15 years earlier it would seem that such

a contrivance would greatly have benefited Lancashire weavers, now I cannot but fear that it is too late, and that the ingenuity and mechanical skill expended on this invention may fail to meet with the full reward they merit, and under other circumstances would probably have attained. The registered address of the company is 8, Bull's Head Exchange Chambers, Market Place, Manchester.

The general course of the trade in piece-goods during the year was greatly affected by the disastrous fall in exchange. The year opened with fair prospects owing to the light stocks held everywhere, but in June when the Indian Government closed the mints, and later on when the Sherman Act was repealed, the markets were entirely thrown out of gear. At first, owing to the light stocks Chinese buyers were able to pay the higher silver prices required, but later on as exchange fell business became more and more difficult, and the year closed with very little doing.

Cotton yarn also fell-off seriously during 1893, the total Yarn. import of English and Indian being 15,920,933 lbs. in 1893 and 17,364,533 lbs. in 1892, a decrease of over 1,400,000 lbs. The import of English yarn for the last 3 years has been:—

Year.						Quantity.
						Lbs.
1893..	..	..	..	..	..	2,934,000
1892..	..	..	..	..	..	3,472,000
1891..	..	..	..	..	..	3,644,400

While Indian yarn was imported to the extent of 12,146,533 lbs., 13,892,533 lbs., and 15,278,215 lbs. in the same 3 years. There has thus been a serious decrease of about 3,000,000 lbs. since 1891, during which year was the highest recorded import. The market was greatly disturbed owing to the fall in exchange, but owing to the very high prices ruling in January and February, which declined as the year progressed, when the Indian mints were closed and exchange with India fell, the higher price demanded was, for the most part, merely a return to prices already known and was more readily ceded than in the case of piece-goods.

Woollens, of which the total import is under 20,000*l.* and is Woollens. of no great importance, also show a falling-off. The decrease shown in 1892 has continued, Spanish stripes and lustres alone showing any increase; the former of 379 pieces, and the latter of 1,053 pieces, while camlets, lastings, long ells, broadcloth, &c., all show a more or less serious decline. Blankets have fallen from 1,023 pairs in 1892 to 779 pairs in 1893. It seems probable that woollens in a climate like that of Swatow, being more or less of a luxury (as pointed out by my predecessor), have felt the general depression which, in spite of the satisfactory results

to the actual traders, during the year no doubt existed throughout the district.

Beancake. Beancake, although there was a considerable falling-off in the import in 1893, still remains the most important article on the import list. The amount imported was 2,163,368 piculs as against 2,710,722 piculs in 1892, a difference of about 64,000 cwts. From information that has been kindly supplied to me it would seem that this decrease is to be attributed in some measure to the high prices ruling last year in Newchwang and Chefoo owing to the large demand in Japan. As a rule, the above ports have control of the market, but when the price reaches a certain point, Hankow and Chinkiang are able to compete with the more northern ports. This was the case last year, Hankow supplying 120,000 piculs and Chinkiang 30,000 piculs. The ability of these places to compete with Newchwang and Chefoo is a very fortunate circumstance, as, had this not been the case last year, the price here would have been prohibitive to all but the largest and most wealthy farmers.

Beans. The import of beans and peas, as (for some unknown reason) a portion of the beans imported here are called in the trade, also fell-off from 999,046 piculs in 1892 to 865,181 piculs in 1893. Hankow is becoming a competitor with Chefoo and Newchwang in this trade also, 200,000 piculs of beans having been imported from that port. These beans are pressed for the most part in the large native steam beancake manufactories here; the oil is used for lighting and cooking, and the refuse, as in the case of beancake from the north, as a most valuable fertiliser. Of the two beancake manufactories, here, one was established during 1893, and, I understand, has not hitherto been worked at a profit. This valuable fertiliser, I am informed, cannot be introduced into Europe at a sufficiently cheap rate, but if some method could be discovered of preventing it from becoming mildewed in transit it would form a most valuable food for store cattle.

Rice and paddy. Owing to the complete failure of the sweet potato crop in consequence of the frost in January, 1893, a greatly increased import of rice and paddy took place as compared with the previous year. The figures are 258,180,533 lbs. for 1893 as against 154,880,667 lbs. in 1892. It is probable that the decreased production of rice grown locally, owing to the extended area of sugar cane cultivation, had also some influence on the trade, as this cause is stated to be the ground of an anticipated increased import during 1894. I believe it is generally held that rice is the staple food of the people, high or low, at any rate in the south of China. The frost of last year, so often alluded to, disclosed the fact that the peasantry, the vast bulk of the population, rarely if ever eat rice; sweet potatoes cut in slices, dried in the sun, and subsequently made into a sort of gruel, are the food of the people. The frost of last year, regarded by foreigners rather in the light of an interesting and unwonted occurrence, was a grave disaster to many millions of Chinese: as will be seen hereafter it was serious enough (among other causes) to probably lead to a

greatly increased emigration to Siam and the Straits Settlements. There can be no doubt that the line between a sufficiency of food and partial starvation is so narrow in China that it takes but very little to force the poorer class across it.

In addition to the increased import of rice, wheat was also more largely imported, a further sign of the scarcity of food stuffs throughout the district.

All the other principal articles of import—metals, valued at 65,152*l.* against 71,339*l.* in 1892; hemp, 6,183,733 lbs. against 7,306,667 lbs.; silk piece-goods, 70,866 lbs. against 94,757 lbs.—show a substantial decrease more serious than the normal fluctuations.

Among sundries few articles call for special mention. The import of kerosene oil fell off very materially during the year from 2,497,832 gallons in 1892 to 2,087,728 gallons last year. The decrease has occurred entirely in Russian oil, which shows a falling off of no less than 422,152 gallons, from 1,708,576 gallons to 1,286,424 gallons; while on the other hand, American oil increased by 13,422 gallons. While it was highly improbable that the advance “by leaps and bounds” of the last few years would continue, there is no need to apprehend that there is any decrease in the consumption of kerosene oil in this district; the enormously increased import of Russian oil in 1892 had simply overstocked the market temporarily. In this case it was no question of exchange, the import from America, also with a gold standard, having increased, though but slightly. It is probable that 1894 may see a great change in the mineral oil trade in Swatow. It is possible that the trade in American oil will greatly decline, as serious steps are being taken to introduce Russian oil in bulk; tanks and other necessary fittings will be established during the year, and though opposition from the Chinese Government is to be expected, it is scarcely possible that it should prevail, as owing to local circumstances (the proposed position of the tanks, &c.) the scheme is here absolutely without objection.

The trade in matches continues to increase, 568,728 gross having been imported against 422,235 gross in 1892. The trade is almost entirely in Japanese matches; European matches have virtually disappeared from this market, 675 gross only having been imported against 4,525 gross in 1892.

The fluctuations in the quantities of the rest of the very long list of sundries, both foreign and native, appear normal and call for no special mention.

During the past year emigration from Swatow increased by almost exactly one-half. Various causes are assigned for this unusual advance, one of which is the serious state of affairs between France and Siam during a portion of the year, which caused a large number of Chinese to return home from Bangkok, who when the state of tension had relaxed returned to Siam during the autumn. It is certain, however, that this cause had very little to do with the matter, as, though passengers to Siam

Emigration

increased from 9,652 in 1892 to 15,509 in 1893, those going to the Straits Settlements increased from 30,728 to 48,601; those to Sumatra (Deli) from 2,991 to 5,930; to Saigon from 1,211 to 2,137; and to Hong-Kong from 14,521 to 17,370, while the passengers from Hong-Kong, the route by which return passengers from all the above places come back, rose only from 46,043 to 51,797. There can be no doubt, though other causes may have been at work, that it was the direct result of the cutting-off of the food supply of the people through the destruction of the sweet potato by frost in the month of January, and, to a much less extent, of the partial failure of the sugar crop.

The total number of passengers during the year was 93,095, while 56,217 returned, as against 62,465 and 50,261 in 1892. British steamers leaving the port for Bangkok and the Straits alone carried 63,063; in addition, the greater proportion of passengers for Hong-Kong, the coast ports, and Saigon travelled by British steamers, as did virtually all those from Hong-Kong and the coast ports to Swatow.

General.

The year has, on the whole, been a quiet and prosperous one for Swatow. In spite of the diminution of trade in certain directions it is asserted by one well-informed merchant that, taking the whole trade of the year into consideration, 1893 was one of the most prosperous years that native merchants have experienced for a long period. The whole trade, except the carrying part, is virtually in their hands; money was made on every article of both imports and exports; and native bankers especially are reported to have coined money.

Steam launches.

The steam launch company is understood to have had a very prosperous year, and the boats have been run without disaster. The talked-of line to Ch'ao-chou-fu, the capital of this prefecture, has, so far as can be learned, made no progress, but it is believed that its establishment is only a matter of time, the lines to Ch'ao-Yang and Kich-Yang having proved so successful and of so much public convenience.

The two other schemes mentioned by Mr. Wilkinson, a railway from Swatow to Ch'ao-chou-fu, and waterworks for a supply of water to Swatow—have not been further mooted during the year. Plans and preliminary surveys, it is understood, are in existence, and if once some satisfactory arrangement could be arrived at with the villages through which the line of railway or the water mains would pass, there seems no reason why these proposals should not be carried out; the former would certainly be a paying speculation, and the latter a great benefit to the town of Swatow. With respect to the railway, however, it may be mentioned, as a somewhat disheartening fact, that so long ago as the year 1869 a preliminary agreement was signed by the then Taotai for a railway from Ch'ao-chou-fu to a place accessible to steamers some 15 miles from that city.

The reclamation of foreshore and the erection of warehouses continues. The China Merchants Steam Navigation Company have just completed their new warehouse on a site reclaimed by

them, and have brought a pontoon down from Shanghai which will, it is understood, be shortly placed in position. The Imperial Chinese Customs have all but completed the construction of a commodious basin to serve partly as a harbour of refuge for small craft in bad weather, and also—on removal of the present examination shed—as a safe anchorage for cargo boats laden with merchandise brought to the customs jetty to be examined.

There seems every prospect that the prosperity of the port and the value of its trade will increase in the future as in the past, but, unless some entirely unexpected development occurs, it will—so far as foreign interests are concerned—be solely in the direction of increased shipping. Native imports and exports will, no doubt, further advance, but it cannot be affirmed at the present time that there is any probability of an increase in the trade in goods of foreign origin (Straits' produce and goods arriving from Hong-Kong not being included in this category), except perhaps in Indian cotton-yarn and kerosene oil; the contrary is indeed to be anticipated.

In concluding this report I have to express my obligation to those members of the mercantile community who have been so good as to supply me with information, and to the Commissioner of Customs for his courtesy in giving me access to the returns of trade before publication.

Annex A.—RETURN of all Shipping at the Port of Swatow during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	1	1,631	814	786,352	815	787,983
Chinese	...	...	56	58,655	56	58,655
German	...	...	32	27,154	32	27,154
Dutch	...	...	2	1,344	2	1,344
Swedish and Norwegian	...	...	3	2,370	3	2,370
Japanese	...	...	8	5,102	8	5,102
American	1	1,087	...	...	1	1,087
Total	2	2,718	915	880,977	917	883,695
„ for the year preceding	2	2,068	949	916,477	951	918,545

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	1	1,631	814	786,352	815	787,983
Chinese	...	...	56	58,655	56	58,655
German	...	...	32	27,154	32	27,154
Dutch	...	...	2	1,344	2	1,344
Swedish and Norwegian	...	...	3	2,370	3	2,370
Japanese	...	...	8	5,102	8	5,102
American	1	1,087	...	...	1	1,087
Total	2	2,718	915	880,977	917	883,695
" for the preceding year ...	2	2,068	950	917,114	952	919,182

Annex B.—RETURN of Principal Articles of Export (including Re-exports) from Swatow during the Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Lbs.	£	Lbs.	£
Native cloth	1,238,800	78,930	1,319,067	87,203
Grass cloth, fine ..	243,200	40,682	231,934	36,955
Oranges	18,819,066	31,349	17,474,800	24,975
Joss paper	4,080,266	55,504	2,954,562	46,226
Sugar, brown and white	135,802,800	625,002	153,724,846	725,938
Tea	873,200	26,782	1,090,166	32,904
Tobacco	3,197,733	142,007	3,175,774	141,020
Sundries	..	350,668	..	317,586
Total	..	1,350,924	..	1,412,807

RETURN of Principal Articles of Import into Swatow during
the Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Lbs.	£	Lbs.	£
Opium	850,000	577,749	952,628	628,545
Foreign cottons and woollens	..	174,807	..	184,137
Metals	..	65,152	..	71,339
Native beancake and beans	403,806,700	762,774	481,367,733	826,953
Foreign cotton, yarn, and thread	15,920,933	413,382	17,365,338	454,634
Rice, native and foreign, and paddy	258,180,533	715,507	154,880,667	421,333
Hemp, native	6,183,733	88,789	7,806,667	100,833
Silk piece-goods	70,866	54,187	94,767	62,377
Wheat	33,281,600	74,913	24,557,067	55,538
Sundries	..	691,346	..	691,730
Total	..	3,618,606	..	3,497,419

Annex C.—TABLE showing: Total Value of all Imports and
Exports to and from Swatow, from and to Foreign Countries,
during the Years 1893-92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	..	..	..	..
Hong-Kong	169,998	186,836	1,497,380	1,622,315
Straits Settlements ..	135,135	105,640	10,722	12,288
Cochin-China, &c. ..	19,287	12,914	76,723	1,950
Siam	62,057	56,863	582	..
Japan	20	..	16,943	12,606
United States	..	..	8,064	3,960
Russia	..	..	19,395	6,000
Java	4,166	1,922	..	..
Sumatra	4,592	3,503	..	..
Total	395,255	367,678	1,629,809	1,659,131

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ON THE

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1894.

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CHINA.

KIUNGCHOW.

Consul Parker to the Earl of Rosebery.

My Lord,

Kiungchow, February 3, 1894.

I HAVE the honour to enclose my Trade Report for 1893. I take this opportunity of acknowledging the facilities courteously afforded to me by the Commissioner of Customs.

I have, &c.

(Signed) E. H. PARKER.

Report on the Trade of Kiungchow for the Year 1893.

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General.

The Kiungchow trade for 1893 has been eminently satisfactory from a British point of view. In spite of the heavy fall in the price of silver, which reduces the average value of the Haikwan tael for the year from 4s. 3d. to 3s. 10d. as compared with 1892—a difference of 20 per cent.—the gold value of the trade has increased from 446,645*l.* to 554,085*l.*; that is, imports have increased from 233,650*l.* to 332,285*l.*, and exports from 212,995*l.* to 221,800*l.*

Though the increase in exports is thus highly satisfactory, it will not escape notice that by far the larger portion of the increase is in imports. It must be explained, therefore, that the import total includes a sum of 92,454*l.*, representing opium which came in junks from Singapore, and nominally passed through the foreign customs (as will be explained under the head of "Opium"). But even allowing for this, there still remains an unmistakable increase of 6,181*l.* in imports, notwithstanding the adverse exchange.

It may be here noted that the foreign customs distinguish between the total trade actually carried on by steamers (including re-exports on both sides), the gross trade (including re-exports on one side only), and the net trade (excluding all re-exports); but the re-exports are so trifling in value that it is not worth while mentioning them in this report at all; and, therefore, any slight discrepancies, whether in totals or in individual items, that may be noticed, especially as compared with last year's report, may be set down to this cause.

British share.

As was the case in 1892, the total trade of the port practically means the trade with Hong-Kong, for of the above-mentioned 332,285*l.* imports, 330,660*l.* are imports from Hong-Kong and Singapore; that is, deducting the aforesaid opium from Singapore, the imports reach 238,206*l.* from Hong-Kong, against 233,323*l.* in 1892; whilst of the total exports, amounting to 221,800*l.*, no less than 217,985*l.* are to Hong-Kong and Singapore; that is, 214,482*l.* to Hong-Kong, against 203,704*l.* in 1892, and 2,503*l.* to Singapore, against 1,099*l.* in 1892.

Other foreign countries.

The only other foreign country that did any direct trade was Indo-China, from which goods to the trifling value of 1,161*l.* were imported, and to which produce was exported to the equally trifling value of 1,247*l.*

Native ports.

Pakhoi alone of native ports did any direct trade with Kiungchow in 1893. The insignificant figures are 463*l.* imports, and 3,569*l.* exports.

Changes in computation.

In former years the foreign customs used to discriminate in their returns between the exports to Hong-Kong destined for foreign countries and those destined for ports on the China coast. This year the attempt to make any such distinction has been abandoned as being uncertain and of doubtful value. The result is that this year there would be a large apparent increase in the one and a large apparent decrease in the other, if calculations based upon the new system were made and compared with the calculations based upon the old system made by my predecessor

for the trade of 1892. But it is unnecessary to do this, and all imports from and exports to Hong-Kong during 1892 are accordingly viewed this time purely in the light of trade with foreign countries.

The import figures for 1893, as given by the customs returns, Opium—
are as follows:— imports of.

	By Junk.	By Steamer.
	Chests.	Chests.
Patna	276	80
Benares	643	..
Malwa	..	6

The price of a catty of opium at Kiungchow stood at 6 dol. 40 c. in February, 6 dol. 30 c. in March, and 6 dol. 10 c. in April. During the next four months, when the junks began to come in, it remained steady between 6 dol. and 6 dol. 10 c. Then it rose gradually until it reached 6 dol. 25 c. in December. (It is now 6 dol. 65 c.) Thus the local prices follow strictly the "law" of supply and demand expressed in the following formula:—"Junk finisby, more dear."

The action of the Indian Government in June does not seem to have affected the price as yet. The local price of gold leaf is quoted to me at 45 dol. the Chinese ounce ($1\frac{1}{3}$ English ounces), say 34 dol. the English ounce, or 4*l.* 5*s.* with the dollar at 2*s.* 6*d.*, a little below the average rate for 1893. I believe 50 sovereigns are supposed to weigh a pound, so that the local price of gold, if correctly quoted, is extremely high.

From the comparative list of principal imports hereto attached it will be seen that, notwithstanding the tremendous fall in the gold values, and the 92,454*l.* worth of opium imported by junk, there has been a net sterling increase in the total. If, however, we deduct the enormous rice import of 22,991*l.* (as compared with 913*l.* for 1892), we must confess to a diminution in both quantities and values.

But there is no diminution in the quantities of genuine British goods imported, such as cotton piece-goods, Indian yarn, and woollens. Even the sterling prices of British cottons and woollens have not diminished in proportion to the fall in exchange; but Bombay has suffered in a remarkable manner—no doubt in consequence of the action of the Indian Government with regard to the coinage of silver in India, which sent the dollar as far below 2 rs. in value as it had formerly been above them.

Each 400 lbs. bale of yarn is divided into 40 hanks, and the retail price of each hank of 10 lbs. was pretty steady at 2 dol. 10 c. up to the end of June, when the Indian Government took its leap in the dark, after which it went up to and remained firm at 2 dol. 20 c. until the close of the year, when it rose to 2 dol. 30 c.

I give the following prices of piece-goods for what they may be worth:—

Articles.	Description.	Price.	Remarks.
		Dol. c.	
White shirtings ..	Irishes (A. K. & Co., H. W. & Co.)	3 95	All the year
	1st quality (E. F.) ..	4 0	Till July
		4 50	After July
	2nd quality (D. K. and E. K.)	3 70	Till June
		3 95	After June
	A. K. & Co.'s (E. F.) ..	4 90	To June-July
		5 10	After July
T-cloths	1st quality	2 15	Till May
		2 20	Till September
		2 40	In October
		2 45	Till December
	2nd quality	2 5	Till May
		2 15	After May

Rice. The heavy imports of rice of course mean a pure loss to the island, as rice is only imported when the local crops run short.

Kerosene. The total imports of kerosene oil have very seriously diminished, no doubt owing to the over-stocks imported in 1892. Diminution in American. The imports of American have fallen more than one-half—that is, from 540,890 gallons to 269,690 gallons (strange to say, the exact number of gallons imported in 1891). On the other hand, the imports of Russian have advanced from 18,000 gallons to 111,950 gallons, the difference of about 5 c. the tin apparently accounting for this very large increase, as the American is considered slightly superior. It is to be presumed that Russian packers have learnt to be more careful, as formerly the inferior packing and the excessive leakage stood in the way of Russian oil. Serious Russian competition.

Sumatra oil. This year Sumatra oil has appeared upon the scene, as a quite new competitor, to the modest extent of 100 gallons (imported by a European merchant). Each box, American or Russian, pays a local charge of 20 c., called “contributions to fort building,” and the average freights from Hong-Kong are quoted for the year at 14 c. The trade prices have remained steady between 2 dol. 12 c. and 2 dol. 20 c. the box throughout the year. Charges on oils.

Matches. Matches, though increased in quantity, have declined considerably in silver value, and very largely in gold value, which proves that the chief import is of the Japanese and not of the European kinds, as the latter could not possibly withstand a loss in exchange of 20 per cent. besides the silver fall. All Japanese. A French steam factory, as mentioned by my predecessor, has lately been started in the Indo-Chinese capital of Hanoi, only 36 hours' steaming distance from Kiungchow; but so far from these matches, which are in some ways superior to the Japanese, being

able to compete with the latter in China, they cannot, though French matches cannot compete, protected by an import duty and a differential labour tax, compete with them successfully on their own ground in Tonquin. Perhaps the fact that the Chinese characters upon the boxes are somewhat travestied, serves to prejudice the Chinese and Annamese dealers against them, and doubtless the reduced price of Japanese matches is accounted for by their desire to drive French matches out.

There is an increase in the quantity of all woollens imported, Woollens. perhaps on account of the unusually severe winter of 1891-92, when, for the first time within the memory of local man, a suspicion of ice was seen in Kiungchow.

All the bamboos in the neighbourhood have died this year, Effects of the which, however, the knowing ones say, is not owing to the cold, cold. but owing to their having flowered the year before. Still, it is remarkable that three out of the four prominent cocoanut trees which formed a sort of land-mark to the mariner, and are marked Land-marks on the charts (five are marked), also died, and were cut down disappeared. during the year. The hydrographical and naval authorities may think it worth while to have the charts corrected.

American flour continues to increase—this time by about Flour. 25 per cent. in quantity; and the silver value is well maintained. I notice that even the peasantry, who know so few luxuries, may now be seen occasionally carrying home half a bag or so to their houses.

The sugar merchants have reason to congratulate themselves Exports—on the operations of the past year. The export of brown sugar, Sugar. 93,223 piculs, is larger than that of any year since 1887; whilst that of white, 7,861 piculs, is larger than the export of either 1892 or 1891. High prices have been more than maintained, and the dealers freely allow that their profits have been large. This trade is a purely speculative one, as large advances have to be made, and the contracts are drawn up whilst, or even before, the crop is in the ground, so that the obscure agriculturalist has little or no interest in the market.

Brown sugar is said to pay a likin duty at Hai-an (across the Charges on Straits, on the peninsula where most of the sugar is grown) of sugar. 21 dol. 80 c. the 100 bags of about 150 lbs. a bag, and white 28 dol. 20 c. At the native Kiungchow customs, brown sugar pays 11 dol. and white 14 dol. the 100 bags, besides, in each case, 2 dol. the 100 bags to the Prefect's customs. Then comes the foreign customs export duty. Freights to Hong-Kong have averaged 7 c. a bag during the year, and the junk freight across the Straits is about 3 c. I had two specimens of white and brown sugar (all four kinds very dirty and coarse) brought to me for inspection. The two white were quoted at 6 dol. the picul (about $1\frac{1}{4}$ d. per lb.), and the other two, which looked almost like "toffee," at 4 dol. 50 c. and 5 dol. 40 c.

Eggs have run up from 13,714,800 in 1892 to nearly Eggs. 21,000,000; but the prices as estimated by the foreign customs are 20 per cent. lower than in the previous year.

Poultry.

Poultry have also gone on increasing amazingly from 322,623 to 413,193; but here, again, the proportionate silver prices as well as the gold prices have decreased 20 per cent. I have endeavoured to ascertain why this is so, and I find that the foreign customs, accepting the Chinese exporters' own valuations, have taken eggs at 2 taels per mille instead of at 2.50 taels as in 1892, and poultry at 8 taels per score instead of 1 tael. As this valuation means less than 2*d.* a piece for a chicken, and 1 dozen eggs for 1*d.*, it is evident that in estimating the trade of the port we may double the values without danger.

Low prices
of provisions.No charges
on eggs or
poultry.

Probably the Chinese exporters' idea is to set a good precedent, in readiness for the evil day when the likin harpies shall scent their prey and demand their percentage. The only explanation I can get at the customs is "perhaps the eggs were older and the chickens younger than in 1892." Meanwhile, I am informed by my cook that I pay from 3*d.* to 7*d.* for every chicken I eat, and about $\frac{1}{6}$ th of a penny for each egg. It is to be hoped that these two industries, poultry and egg raising, which seem peculiarly well suited to the conditions of life on this island, will be permitted to develop in peace and quietness without ever attracting the attention of the likin authorities. It is a great boon to the country folk, who live almost in common and on terms of equality with their pigs and poultry, to be able to earn a little money for luxuries in this quiet way, and it is also a great advantage to the Hong-Kong consumer. It is quite a new trade.

Pigs.

Pigs also maintain their position bravely; having gone up from 47,000 to 58,000, and the silver price has gone up too. Of course the fall in silver in no way affects the provision trade, as all shipments are to Hong-Kong, which is a silver country. No foreign firm has thought it worth while to enter seriously into competition for the provision trade, and the chances of their doing so are remoter than ever. The ever-encroaching likin authorities placed a small extra tax of about 1*d.* per pig upon the trade last summer. Trade at once stopped; but the matter was compromised.

Charges on
pigs.

The regular likin is now fixed at 22 c. per pig, and 2.1 c. for "coast-defence"; total 24.1 c., or, say, 6*d.* The pigs are sold by the picul of 133½ lbs. During the spring the price was constant at 9 dol. In June it went down a little. Then for 3 months it fluctuated between 9 dol. 20 c. and 9 dol. 40 c. In December it reached 10 dol. 3 c., and now it is down to 8 dol. The freight on pigs varies hour by hour; if only one steamer is in port, it may go up to 80 c.; if two or three, down to 40 c., or even 20 c. Hence some of the regular coasters running between Hong-Kong and Pakhoi via Kiungchow occasionally turn round slyly, without going to Pakhoi, in order to obtain the coveted pigs which the dealers are only too anxious to be rid of, for it is expensive to stall and feed them in town, especially with a healthy winter appetite on them.

Emigration.

The Franco-Siamese difficulty interfered sadly with the emi-

gration to Bangkok, and scarcely any passengers left for that port during the second half of the year; several times steamers were all but chartered; but at the last moment the Chinese, who seem to have been accurately informed, decided not to risk it. (Just as the new year, 1894, commenced, however, a steamer left with over 900 passengers for Bangkok; but of course this does not concern 1893.) Notwithstanding this, 7,829 passengers left for Singapore during 1893, against 5,172 in 1892, and 3,612 left for Bangkok, against 1,538 in 1892. The passenger traffic to Hong-Kong increased enormously, from 3,970 in 1892 to 6,097 in 1893. And the same thing with regard to return passengers. From Singapore there were 4,042, against 3,193 in 1892. From Bangkok, 1,506, against 1,119; Hong-Kong, 10,499, against 7,720. The movement between the three French ports of Haiphong, Tourane, and Quinhon, insignificant though it was, even in 1892, has further decreased during 1893. In 1892, 63 went to Haiphong, 81 to Tourane, and 10 to Quinhon. In 1893 the respective numbers were only 38, 72, and 0. In 1892, 65 returned from Haiphong and 44 from Tourane. In 1893 the numbers were 68 and 9. The grand total is 17,892 passengers outwards and 16,372 inwards, against 10,988 and 12,320 for 1892, a very remarkable increase. It must be remembered, too, that each return passenger brings from 5*l.* to 10*l.* of savings with him. The Chinese authorities fortunately ignore them.

The following prices of local produce have been given to me by an intelligent Chinese, and I enumerate them, without guaranteeing their accuracy, in case any British merchant may perchance see his way to make money:—

Articles.		Price.	
		From—	To —
		Dol.	Dol. c.
Betel-nuts	Per picul ..	..	11 0
Silk .. .. .	.. ..	400	450 0
Cow-hides (cured) .. ..	.. ..	..	28 0
" (uncured) .. ..	.. ..	..	9 90
Cuttle fish .. .. .	.. ..	..	2 60
" (small) .. ..	.. ..	..	1 20

The octroi, or Prefect's tax, on the above is as follows:—

Articles.		Amount.	Equivalent.
Betel-nuts	Per 10,000 ..	40 cash	4 cents
Silk	Per picul ..	4 mace	1 <i>s.</i> 4 <i>d.</i>
Cow-hides (cured) .. ..	.. ..	2·5 candareens	1 <i>d.</i>
" (raw)	Each	1 cash	$\frac{1}{3}$ <i>d.</i>
Cuttle-fish	Per picul ..	2 mace	..

But the last item is paid, not to the Prefect (who would have a difficulty in proving that fish were caught on shore), but to the native maritime customs at Hoihow.

Transit.

In 1892 the transit trade was confined almost entirely to galangal, this produce, to the value of 21,750 taels, having been brought down. The quantity is about the same for 1893, but the value has gone down to 16,349 taels. On the other hand 20,336 taels worth of sugar has been brought down to Hoihow under transit pass, against 1,300 taels in 1892, and a total number of 78 transit passes have been issued, against 54 in 1892, so that the transit trade has been as flourishing as all other branches. In this department two European firms, one British and one German, have taken a share. In fact they have monopolised it all, so far as taking out passes goes, from which I conclude that natives dare not avail themselves of the transit pass privilege, and associate their interest with that of foreigners in some recondite way best known to the trade.

Shipping.

In this department the apparent position of every nationality is more or less fictitious, and the equation of error requires some calculation and definition. Great Britain appears as a star of the fifth magnitude, but, so far as the practical and all-important point of money-making is concerned, she is one of the first, if not the first. Thus her percentage of tonnage is almost the lowest, being only 12·66 (in 1892 it was 8·60), whilst her percentage of tonnage dues paid is the highest, namely 33·83. This means that every British ship that comes to the port is a big one, and either brings or takes from 300 to 1,000 emigrants, which, again, indicates a certain freight list of about 400*l.* for the Hoihow portion alone. One steamer "grossed" 900*l.* on her Hoihow coolies. As there were 22 British steamers (the 23rd, a coal steamer, having put in after being ashore) which entered and cleared, and 5 more which did not enter and clear, all 27 with cargoes of coolies, and, if not full, of merchandise or coolies for other ports. This means that British shippers secured about 12,000*l.* of bonâ fide Hoihow freights. On the other hand, the tonnage of Danish shipping appears for 38·23, the highest percentage of all (in 1892 it was 31·20), whilst the tonnage dues percentage is only 18·48, the lowest but one. As a matter of fact the Danish freights all go into the pockets of Hong-Kong Chinese, who, owing to French competition, have made a very small profit, if any, on the year, whilst the Danish owners in Europe have, with a low exchange, drawn about 300*l.* a month

Danish barely
pays expenses.

on two, and 400*l.* on the third steamer (the third steamer is French chartered), that is to say, their combined earnings, not counting docking, insurance, and other expenses, barely equal those of the British steamers, whose Hoihow earnings are often only a portion of the total freight earned, as most of them carry coolies or cargo from or to Hong-Kong, Amoy, and Swatow as well, whilst the Danish earnings include their share (the largest) of the Pakhoi trade. German shipping has decreased from 47·84 in 1892 to 35·75 in 1893, whilst the tonnage dues have

Decrease in
German.

decreased from 37.71 to 32.13. The two regular German coasters are, like the Danish, chartered by Chinese, and, as in the case of the Danish steamers, the charterers have barely covered expenses, whilst the owners have not even done that. On the other hand, two or three German steamers have taken away, and two or three have brought back cargoes of emigrants, so that the total German earnings may be put down at about 12,000*l.* too. The one casual Norwegian steamer may be dismissed from consideration. There now only remains of foreign shipping the French, with a percentage of 12.90 tonnage (against 9.67 in 1892), and 15.56 tonnage dues (against 14.11 in 1892). But the percentage of French cargoes carried is only 4.41, against 46.81 Danish, and 30.63 German. True, British is only 1.49, but we have seen that British passenger earnings at Hoihow alone are equal to the whole Danish or German earnings at Hoihow and Pakhoi combined, whilst there is practically no passenger traffic at all from Hoihow to the French Protectorate. Moreover, the two new French steamers, which are now making a bold bid for the coast trade, are both English built, and the chief owners reside in Hong-Kong. The single French-built steamer which used to call here before these two steamers began to compete has abandoned the trade as unprofitable. The French percentage of trips made is only 9.04, against 47.89 Danish, 35.84 German, 6.93 British; and the French have called the largest number of times (35) without doing any cargo business at all. I think, therefore, if we estimate the gross French earnings, passengers included, at 2,000*l.* we shall not be below the mark.

Increase of
French
shipping

Small French
earnings.

But the Chinese shipping is in the most remarkable predicament of all. Although it is totally non-existent in the shipping table, yet it appears in the percentage table for 16.79 per cent. of the foreign, and 16.66 per cent. of the total trade. It need hardly be said that this mysterious percentage refers to the 92,454*l.* worth of opium brought, no one knows whither, in the phantom junks from Singapore, upon which no duty has been paid. Though British, Danish, and German earnings are about equal, British contributions to the revenue are only 5.02 per cent., whilst German are 37.68 per cent., French, 4.98 per cent.; Danish, 52.32 per cent.; and Chinese nil. But even here there is illusion, for the Danish and German contributions of all descriptions come out of Chinese pockets, whilst the Chinese nil is really "matter in the wrong place," and represents a minus quantity of 25,000*l.* in the pockets of certain shrewd Chinamen, but belonging to the foreign customs, whose revenue this year, despite a cheery prosperity in every single department, is the lowest on record, at least so far back as my available records go, which is to 1883. It has dwindled from 207,914 taels in 1887 (to which it had steadily risen from 94,367 taels in 1883) to 88,459 taels in 1893.

Curious
position of
Chinese
"shipping."

Loss of
customs
revenue.

Thus the customs returns for 1893, when the light of criticism is shed upon them, disclose the following facts, which ought not to be unsatisfactory to the British public. (1) All the trade

(with insignificant exceptions) is with British possessions. (2) All the real profits on shipping are British, and if any other profits in this line have been made it is solely by British built steamers, or by persons residing in British colonies. (3) The British contribution to the revenue is of the least. (4) The foreign customs, the most deserving of all, comes off worst in the general struggle for a livelihood. (5) Chinese officials seem to be responsible for this disaster to their own Government. Thus the conditions of trade in the remote island of Kiungchow are very illusory.

General.

Lights, buoys,
and beacons
in abundance.

Hoihow, as I mentioned in my trade report for 1890, was then totally destitute of buoys, beacons, or lights. Now, besides the three buoys introduced during the winter of 1891-92, there is a beacon on Hainan Head; the buoys have had new cages put on, and three light-houses are being constructed. The one near the great Hoihow fort is progressing apace; the site for the Cape Cami light is fixed, and the one on Lim-kao Point will be taken in hand last. Thus, far from being the most neglected, Hoihow will soon be one of the best provided of ports. The light for Hoihow is being provided by France, as she is ahead of us in the matter of reflectors, a subject for British manufacturers to reflect upon, if they wish to maintain their position. Some local mariners think that Pak-sha would have been a better position; but, as very judiciously explained by Mr. Harding, the constructor (who also built the Waglan lighthouse near Hong-Kong), the sands at Pak-sha are often washed away, and so changeable that, whilst admitting the eligibility in other respects of the site, he considered the difficulties of securing a foundation insuperable.

Building
operations.

Hoihow a year or two ago was a place where foreigners could not get land at any price. Now, in addition to the extensive customs and lighthouse sites, the British Consulate has secured a piece of building land on Cocoa-nut Island, and a German firm has already filled in an eligible building site hard by. Moreover, the American missionaries at Kiungchow are about to build a hospital and commodious residence just outside the walls of Kiungchow, where there are five families of them.

Births,
deaths,
marriages.
Tides.

For the first time on record there have been British births, marriages, and deaths registered during one and the same year.

The tides of Hoihow are as hopeless a puzzle as ever. Though the customs authorities have now 4 years' records, there is absolutely no rule to be deduced therefrom. The tides outside the spit are regular enough, but those inside elude the wit of man to account for, and the level of the water outside is positively said to be often several feet above that inside. There is a tidal creek near my house over which I can rarely walk during the day in summer, but I have walked over it every day but two at 6 P.M. during the past 2 months, a fact which of itself renders the inner tide question inexplicable. Perhaps the best explanation given is that of a Chinese naval commander, who says that, owing to the conformation of the spit, it is impossible for the water to flow into the mouth of the creek

when the north-east wind blows and the tide is rising. That would appear to explain why, during the day, the winter tides are almost invariably low inside the spit, whilst during the night, when the wind usually drops, they have an average height. Perhaps also the blowing of the wind from the south-west direction explains why, during the typhoons of the end of September and beginning of October, Hoihow was completely under water, and the tides were 4 feet above the highest ordinary mark; but I am not able to say from what direction the wind was actually blowing when the floods took place, it appeared to blow from all directions.

The foreign customs authorities have taken steps at last to remedy the irregularities descanted upon in my trade reports for 1890 and 1891. From January 1, 1894, every steamer that brings or takes passengers or cargo has to enter and clear, so that in future the shipping table will not be so deceptive. The French Company is getting down a hulk, which will obviate the delays alluded to in my report for 1891, and if steamer agents will only use registered cargo boats, any steamer will be able to discharge or load cargo at any time, the boarding officer doing all necessary clerical work on the spot. It will probably take time to drive a conviction of the great possible advantages derivable from these desirable innovations into the thick pates of local Chinese agents and boatmen. The latter especially are a conservative body of monopolists, who have probably experienced no change of method for a thousand years, and, indeed, many of their simply constructed boats (which, however, are admirable sailers, and move under their hands with the precision of a hansom cab), look, honeycombed with age as they are, very antediluvian in appearance. Yet a great deal is to be hoped from a port which introduces lighthouses, buoys, beacons, hulks, telephones, forts, and building sites all within the short period of 3 years, and possibly the Hoihow boatmen will follow the inexorable laws of progress before long.

Two vessels, the French mail packet "Haiphong," and the British coal steamer "Edendale" ran ashore during the year, but both were got off with the ready assistance of Colonel Ch'ên and the Chinese gunboats. The "Edendale" ran ashore in broad daylight upon the Cape Cami banks. The accident was, as usual, caused by the carelessness of the Chinese pilot, who in this case had been provided by the insurance companies. Captain Humphreys, not liking the look of his position, had only just asked the pilot if he was certain where he was going to. "Perfectly," said the pilot, as he there and then ran the steamer on a bank at the extreme top of the highest spring flood tide.

COMPARATIVE List of Principal Articles of Import into Kiung-chow during the Years 1892-93.

Articles.		1892.		1893.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Foreign goods (proper)—					
Opium—					
Patna	Pounds ...	25,665	16,522	57,216	37,668
Benares	" ..	1,092	670	102,880	63,888
Malwa	" ...	556	414	835	624
Indian yarn	" ...	2,667,733	71,233	2,911,746	56,375
White shirtings	Pieces ...	24,817	11,837	24,220	10,677
T-cloths	" ...	16,264	4,119	16,667	3,989
Other cottons	" ...	...	8,459	...	8,555
Rice	Tons ...	110	918	4,600	22,991
Kerosene oil	Gallons ...	558,890	18,472	381,740	9,468
Matches	Gross ...	178,620	8,118	195,338	7,360
English camlets	Pieces ...	656	1,319	811	1,458
Long ells	" ...	2,734	2,537	3,200	2,771
Cloths	" ...	169	891	251	1,264
Quasi-foreign goods—*					
Vermicelli	Tons ...	514	10,841	452	8,902
Medicines	" ...	...	9,768	...	11,618
Other goods... ..	" ...	...	67,439	...	84,687
Total	...	...	233,652	...	332,285

* Last year these quasi-foreign goods (as I have called them) were enumerated as native goods; but as they all come via Hong-Kong, the foreign customs makes a change this year, and counts them as foreign goods.

The total native imports (proper) amount only to 463L., and are therefore too insignificant to be worth enumerating.

COMPARATIVE List of Principal Articles of Export from Kiung-chow during the Years 1892-93.

Articles.		1892.		1893.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Pigs	Number ...	47,232	60,177	58,272	67,013
Sugar—					
Brown	Tons ...	4,793	33,753	5,434	44,336
White	" ...	432	5,234	471	6,340
Betel-nuts	" ...	538	12,168	357	9,476
Sesamum seeds	" ...	649	10,104	493	6,219
Leather	" ...	208	9,734	229	11,033
Hemp (pine-apple fibre)	" ...	131	3,903	118	3,222
Ground-nut cake	" ...	1,199	6,260	945	4,475
Eggs	Number ...	13,714,800	7,107	20,903,620	7,936
Poultry	" ...	322,623	6,810	413,193	6,520
Other goods	" ...	...	51,642	...	49,230
Total*	...	...	212,897	...	221,800

* The re-exports are so trifling as not to be worth enumerating or deducting.

RETURN of all Shipping at the Port of Kiungchow during
the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	..	..	23	22,870
German	..	..	119	64,603
French	..	..	30	23,316
Danish	..	..	159	69,114
Norwegian	..	..	1	836
Total*	..	..	332	180,739
" for the year	..	..	312	..
preceding ..	..	..	..	..

* In addition there were 5 passing visits by British steamers which, without entering or clearing, shipping or landing cargoes, dropped return emigrants from Singapore and Siam; and 35 visits of French, 26 of German, and 24 of Danish coasters, which merely called in to land passengers and mails.

CLEARED.

Nationality.	Sailing.		Steam.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	..	..	23	22,870
German	..	..	119	64,603
French	..	..	30	23,316
Danish	..	..	159	69,114
Norwegian	..	..	1	836
Total*	..	..	332	180,739
" for the year	..	..	313	..
preceding ..	..	..	..	..

* In addition there were 5 passing visits by British steamers which, without entering or clearing, shipping or landing cargoes, dropped return emigrants from Singapore and Siam; and 35 visits of French, 26 of German, and 24 of Danish coasters, which merely called in to land passengers and mails.

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AND FINANCE.

CHINA.

REPORT FOR THE YEAR 1893

ON THE

TRADE, &c., OF SHANGHAI.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1266.

*Presented to both Houses of Parliament by Command of Her Majesty,
JULY, 1894.*

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CHINA.

SHANGHAI.

Consul-General Hannen to the Earl of Kimberley.

My Lord, *Shanghai, April 27, 1894.*

I HAVE the honour to forward herewith a Report on the Trade of Shanghai for the year 1893, which has been drawn up by Mr. Consul Jamieson.

I have, &c.
(Signed) NICHOLAS T. HANNEN.

Report on the Trade and Commerce of Shanghai for the Year 1893.

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The gross value of the trade of the port for 1893 according to the customs' valuation is as follows:—

	Value.	
	Currency.	Sterling.
	Haikwan taels.*	£
Imports, foreign and native	139,268,000	27,418,388
Exports, of local origin	37,750,000	7,432,032
Total	177,018,000	34,850,420

* Exchange: 1 Haikwan tael = 3s. 11½d.

These figures compare with previous years as follows. The comparison is made in currency rather than in sterling, as the silver values correspond much more nearly to the actual quantities of commodities than do the corresponding figures in gold, varying as these must do with every fluctuation in exchange.

COMPARATIVE Table of Gross Value of Trade, *i.e.*, Original Imports and Exports, exclusive of Re-exports, during the under-mentioned Years.

Year.	Value.		
	Imports.	Exports, of Local Origin only.	Total.
	Haikwan taels.	Haikwan taels.	Haikwan taels.
1893	139,268,000	37,750,000	177,018,000
1892	127,968,000	38,859,000	166,827,000
1891	124,710,000	40,833,000	165,543,000
1890	114,945,000	30,200,000	145,145,000
1889	107,513,000	38,136,000	145,649,000
1888	114,114,000	32,803,000	146,917,000
1887	108,038,000	30,196,000	138,234,000
1886	102,437,000	30,234,000	132,671,000
1885	101,123,000	26,880,000	128,003,000
1884	86,612,000	26,603,000	113,215,000

These figures, however, comprise two distinct elements, one being the interchange of goods between Shanghai and foreign countries, and the other the interchange of native produce between Shanghai and other ports of China.

Foreign and native portion of trade of port distinguished.

Distinguishing these two, the progress of the trade can be better exemplified thus:—

Table I.—COMPARATIVE Table of Foreign Trade of Shanghai, showing Imports of Foreign Goods and Exports of Native Produce to Foreign Countries, during the undermentioned Years.

Year.	Value.		
	Imports.	Exports and Re-exports.	Total.
	Haikwan taels.	Haikwan taels.	Haikwan taels.
1893	83,974,000	49,979,000	133,953,000
1892	78,777,000	43,326,000	122,103,000
1891	77,336,000	40,009,000	117,345,000
1890	66,426,000	32,742,000	99,168,000
1889	59,347,000	41,618,000	100,965,000
1888	68,661,000	36,460,000	105,120,000
1887	63,023,000	36,700,000	96,720,000
1886	60,055,000	31,310,000	91,365,000
1885	59,804,000	27,655,000	87,459,000
1884	47,158,000	29,530,000	76,688,000
1879	59,990,000	32,044,000	92,034,000
1874	47,488,000	30,783,000	78,271,000

Table II.—COMPARATIVE Table of the Trade between Shanghai and other Ports of China, in which we are interested mainly as Carriers, during the undermentioned Years.

Year.	Value.		
	Imports.	Exports and Re-exports.	Total.
	Haikwan taels.	Haikwan taels.	Haikwan taels.
1893	55,293,000	32,453,000	87,746,000
1892	49,190,000	36,205,000	85,395,000
1891	47,374,000	40,984,000	88,358,000
1890	48,518,000	38,092,000	86,610,000
1889	48,166,000	36,935,000	85,101,000
1888	45,452,000	35,606,000	81,058,000
1887	45,014,000	35,488,000	80,502,000
1886	42,382,000	34,249,000	76,631,000
1885	41,318,000	32,932,000	74,250,000
1884	39,454,000	29,648,000	69,102,000
1879	40,339,000	30,627,000	70,966,000
1874	32,975,000	20,820,000	53,795,000

These figures would indicate a very substantial advance in the foreign trade of the port during the past year, but they must be read with certain explanations. In the first place it is intimated by the customs' authorities that an alteration has been introduced this year in the classification of foreign and coast-trade cargoes, whereby all goods shipped for, or coming from, Hong-Kong are classed as exports to, or imports from, a foreign country, instead of being assigned as heretofore, partly to the one and partly to the other of the foreign and native categories, according to their probable destination or origin. The effect of this is to make the coast trade appear smaller and the foreign trade appear larger than it otherwise would.

Thus the foreign imports would appear to show a gain of 7 per cent., and the exports of about 15 per cent., but for purposes of comparison the greater part of this must be discounted for the reason stated, and a corresponding addition be made to the native division of the trade.

A still further discount has to be made in regard to foreign imports when it is pointed out, as will appear later on, that owing to the further great fall in the gold value of silver which has taken place during the year, the price in currency of many foreign articles rose considerably. In reality there has been a great falling-off in the foreign imports, especially in the large staples such as Manchester cottons, Indian yarn, and opium. This will be noticed more fully later on.

The two following tables show the principal foreign countries with which Shanghai does business, and the comparative proportions of the trade with each :—

Progress of
foreign
portion.

Rise in silver
price owing
to fall in
exchange.
Foreign
imports.

Comparisons.

Table I.—IMPORTS into Shanghai from Foreign Countries, showing Origin of the Goods Imported, during the undermentioned Years.

Country of Origin.	Value in Thousands.			
	1872.	1882.	1892.	1893.
	H. taels.	H. taels.	H. taels.	H. taels.
Great Britain	28,784	18,271	28,278	26,896
Hong-Kong	4,056	6,071	17,437	20,524
India	18,488	18,264	13,847	16,729
Straits Settlements and Siam	732	974	1,170	1,177
United States of America	410	3,249	5,835	5,193
British North America	177	219	695	1,311
Continent of Europe ..	396	2,435	5,084	5,468
Japan	2,630	4,178	5,834	6,296
Other countries ..	1,389	1,332	597	380
Total	57,062	54,993	78,777	83,974

Table II.—EXPORTS from Shanghai, arranged according to Country of Destination, during the undermentioned Years.

Exported to—	Value in Thousands.			
	1872.	1882.	1892.	1893.
	H. taels.	H. taels.	H. taels.	H. taels.
Great Britain	29,562	11,276	7,262	7,694
Hong-Kong	771	788	2,042	6,248
India	412	463	1,394	2,735
Straits Settlements and Siam	59	484	359	507
United States of America	8,553	5,771	7,274	7,954
British America ..	..	12	121	240
Continent of Europe ..	4,663	8,769	17,023	15,641
Egypt, Persia, and Turkey in Asia ..	138	54	730	891
Russian Manchuria ..	37	524	832	1,006
Japan	798	1,180	6,249	7,047
Other foreign countries	71	20	41	16
Total	45,064	29,291	43,327	49,979

These tables illustrate in a striking manner the changes which Direct trade have befallen the China trade during the last 20 years or with England. 25 years.

The direct imports from England, measured in silver values, are actually less than they were in 1872 by some 6 per cent.

The exports to England have fallen in value as much as 75 per cent. In 1872 the imports of goods from England were slightly over 50 per cent. of the whole trade, and the imports from England, (1796)

India, and all British Possessions amounted together to more than 90 per cent. of the whole. In 1893 these same imports only formed 80 per cent. of the whole, and the direct imports from England have fallen to 32 per cent. of the whole. Similarly, the direct exports to Great Britain, which formed 65 per cent. of the trade in 1872, have fallen to only 15 per cent. in 1893.

Trade with
India.

The trade between India and Shanghai shows a considerable and continuous rise both in imports and exports.

In the tables the position of India is not correctly shown, as a great deal of the traffic which merely passes through Hong-Kong as a port of transshipment is put in the customs' returns to the credit of that colony instead of to India. Thus of the opium and yarn entering Shanghai in 1892 and 1893, more than 10,000,000 Haikwan taels worth are entered as imports from Hong-Kong, whereas, in reality, both come from India. This was not the case in the earlier years, or only to a very small extent. Thus for purposes of comparison, about 10,000,000 Haikwan taels should be struck off the imports from Hong-Kong and added on to those of India.

With this explanation it will be seen that the trade between India and China has been growing very satisfactorily.

Yarn.

This year however, as will be shown later on when I come to speak of yarn imports, it has received an unfortunate check due principally, if not entirely, to the recent change in the Indian currency system.

Trade with
Japan.

The trade with Japan continues to grow at a rapid rate, particularly in the exports from China, which consist for the most part of raw cotton for the supply of the Osaka mills. Japan has also, to a small extent, begun to send back to China the produce of her mills in the shape of yarn and manufactured cloth.

Direct trade
with
Continent
of Europe.

Direct trade with the Continent of Europe has developed to very large figures, and this doubtless explains to a great extent the falling-off in the direct trade with Great Britain. The opening of the Suez Canal has brought all the southern ports of Europe so much into the direct line of route to and from the East, that it is a saving to make shipments direct instead of *viâ* London, as was formerly the case. The change is more in the method of distribution than in the actual trade itself. The opening of direct steam communication between China and the large cities on the Atlantic seaboard, such as Antwerp, Bremen, &c., has also assisted in diverting cargo which used formerly to go to London. This is particularly the case in the two articles of tea and silk. Tea for Russia now goes direct instead of *viâ* London, and as Russia is now the chief buyer of China teas that cuts out a large slice of the former direct trade with England.

Growth in
Asiatic
portion of
trade.

Speaking generally, it may be said that these tables show the development of trade has been mainly in the Asiatic portion, that is, in the exchange of commodities with other silver-using countries, while the trade with Great Britain, even taking silver values, has been stationary or retrograde. Much more would this be the case if the values were given in sterling.

The return of shipping presents no special feature of interest.

The relative proportion of British and foreign tonnage entered and cleared at Shanghai is as follows :—

Year.	Total Entered and Cleared.		Proportion under British Flag.
	Number of Vessels.	Tonnage.	
1871	3,510	1,901,775	Per cent. 43
1881	4,844	3,690,241	55
1891	6,372	6,252,005	56
1892	6,396	6,540,275	57
1893	6,317	6,529,870	56

The principal feature of the trade of the year has been a further great collapse in the gold value of silver, entailing further changes of prices both here and in Europe. In the beginning of 1892 the exchange value of the Shanghai tael for sight drafts on London stood at 4*s.* 3*d.* On January 1, 1893, it was 3*s.* 9*d.*, and on January 1, 1894, the rate was 3*s.* 1½*d.*, being a fall during the two years of 26 per cent. Further great fall in silver.

It will be readily understood that such a very great divergence in the relative values of the currencies of the East and West must have brought about equally great fluctuations in the prices of all commodities entering into the international trade. Either the silver price in the East must have risen or the gold price in the West must have fallen. In either case the fluctuations have been a source of great anxiety to all engaged in trade, and while in some cases the result has been favourable to the merchant, in the great majority of cases heavy losses, through the constant depreciation of values, have been entailed.

In the matter of imports of Manchester goods the general course of things during the long period since silver began to decline in value has been that the gold price in England has fallen almost *pari passu* with the fall in silver. An ordinary piece of shirtings, which in 1872–74 cost from 10*s.* to 10*s.* 6*d.* in Manchester, is now invoiced out at from 6*s.* to 6*s.* 2*d.* As a consequence the selling price in silver in the East remained throughout remarkably steady up to about the end of 1892. In 1893, however, that has not been the case. The Manchester market for the first time has ceased to follow the downward course of silver, and, as a consequence there has been a rapid rise in prices on this side. This will be exemplified in the tables given below. Manchester goods.

Table I.—PRICES of certain Standard Fabrics based on Actual Sales supplied by Private Firms during the Years 1888–93.

Articles.	1888.	1889.	1890.	1891.	1892.	January, 1893.	December, 1893.
	S. taels.	S. taels.	S. taels.	S. taels.	S. taels.	S. taels.	S. taels.
Medium, 8½ lb., shirtings	1.72	1.74	1.57	1.57	1.63	1.70	2.12
10 lb. shirtings ...	2.20	2.22	2.18	2.21	2.28	2.80	2.75
12 lb. shirtings ...	2.56	2.66	2.64	2.64	2.62	2.70	3.00
64-reed white shirt- ings... ..	1.89	1.90	1.80	1.73	1.82	1.95	2.45
72-reed white shirt- ings... ..	2.03	2.04	1.96	1.92	2.02	2.10	2.65
Medium, Irish-fold, white shirtings ...	2.59	2.59	2.52	2.53	2.62	2.75	3.40

Table II.—TABLE showing Proportional Variations in Local Prices of 10 Standard Cotton Fabrics of English Manufacture, based on Published Prices realised at Auction. (Prices of Year 1882 = 100.)

Year.	Prices.
1882, average year..	1,000
1883, prices in June ..	987
1884 ..	995
1885 ..	990
1886 ..	994
1887 ..	1,036
1888 ..	1,080
1889 ..	1,084
1890 ..	1,006
1891 ..	952
1892 ..	979
1893, prices in January ..	1,135
1893 .. June ..	1,154
1894 .. January ..	1,394

It is too early yet to draw any certain inferences from these data. The Manchester market would appear to have been strengthened during the year by the large demand for India, and but for that prices would possibly have given way. The fall in silver has been so rapid that it is possible it has not had time to produce its final effect on prices of commodities. One of the consequences of that fall is that large quantities of China cotton at very cheap rates are going forward to Liverpool, a thing that has not happened since the cotton famine of 1863–64. This will doubtless tend to lower home prices, at least in certain classes of fabrics.

The prices prevailing during the year, and especially during the latter half of the year, have thus been fairly remunerative to the importers.

I referred in my last year's report to the change that had recently been introduced in the method of doing business under

the name of the "indent system," whereby the risk of market was thrown on the Chinese dealers, the foreign middleman contenting himself with his commission, and settling his exchange forward through a bank at the time of entering into the contract. Causes at work tending to rise in silver prices

An alternative method was largely pursued last year in contracts made for future delivery, by which the price was made to depend on the rate of exchange that might then be found prevailing—that is, the Chinese dealer guaranteed a certain minimum rate of exchange.

In this way the Chinese dealers were largely pledged to a high rate of exchange, and they found that the only means by which they could recoup themselves was by maintaining a high silver price all round. Their efforts in this direction, joined to those of foreign merchants, have had the effect of putting prices up to a level which they have not touched for many years.

But while the course of business has been thus satisfactory enough to the middlemen, both Chinese and foreign, it has not been so either to the native consumer or to the British manufacturer. The latter has been affected, inasmuch as the import of Manchester goods has fallen off enormously as compared with the average of previous years. The exact figures will be given further on. Import of cotton goods.

The great decrease shown in the statistics for this year do not, of course, indicate a permanent falling-off in the demand to that extent, as dealers were compelled, with such high prices ruling, to supply their wants from day to day, fearing to keep a large quantity on hand. Stocks in the country are probably well nigh exhausted, and probably, therefore, the season 1894 will see a considerable recovery. But if the high level of prices is maintained over any great length of time there is bound to be a large and permanent reduction in the consumption, and, what is still more serious, there is bound to be a great stimulus to local manufactures and to manufactures in the East generally.

The import of yarn from India would appear to have been affected by currency changes to a similar extent. The exchange between Shanghai and Calcutta, which had previously been steady at 303 rs. 5 a. per 100 taels, dropped immediately on the passing of the Indian Currency Bill to 244 rs. per 100 taels, at or about which figure it has since remained. At the same time the price in Shanghai of a bale of Indian yarn, No. 20, rose gradually from 52 taels to 54 taels in June to 66 taels to 68 taels in January, 1894. The effect on the importation, quarter by quarter, as compared with the previous year, is shown in the following table:— Import of yarn.

TABLE showing Importation of Bombay Yarn during the
Years 1892-93.

Quarter Ended—					Quantity.	
					1892.	1893.
					Piculs.*	Piculs.*
March	31	..	..	..	145,658	116,167
June	30	..	..	..	215,566	182,466
September	30	..	..	..	176,004	83,976
December	31	..	..	..	155,819	104,647
Total	..	..	..	..	693,047	487,256

* 1 picul = 133½ lbs.

Future
prospects.

It will be seen from the foregoing that in the quarter immediately following the closing of the Indian mints the importation fell off to one-half what it had been in the corresponding quarter of the previous year, and only slightly recovered in the following quarter. The future of the trade between India and China cannot as yet be forecast with any degree of certainty, but the above figures would indicate a probably serious falling-off in the consumption of yarn, and the enhanced prices will, as pointed out in the case of Manchester goods, make it all the more profitable to manufacture locally.

The fall in silver has had no less disturbing effects on exports from China to Europe. While there is, doubtless, a general tendency in such fall to promote the volume of exports, the first and immediate result in many, if not in most, cases is to lower the European price. Heavy losses have thus been entailed on shippers of local produce, who found, much to their disappointment, that by the time their shipments reached the London market the selling price had fallen in sympathy with the decline in silver in such a way as often to convert an anticipated profit into a loss.

Silk.

This has been particularly the case in the silk market, where the low exchange, coupled with a languid demand, has forced down London prices by some 20 per cent. to 25 per cent., entailing heavy losses on importers. Tables illustrating this will be found later on under the heading of "Exports."

Imports from Foreign Countries—Manchester Goods.

Grey and
white
shirtings.

The important fact to be noticed in this connection is the great falling-off of the year's import of cotton goods. I have adverted above to the rise in prices and its cause, and the result is seen in the following table:—

Table I.—IMPORT of Plain Shirtings.

Year.	Quantity.	
	Grey.	White.
	Pieces (of 40 yards).	Pieces (of 40 yards).
1881-85, average	5,099,000	1,563,000
1886-90 "	5,858,000	1,817,000
1891 "	5,644,000	1,914,000
1892 "	6,117,000	1,567,000
1893 "	3,997,000	1,223,000

The import of the class of fabric known as T-cloths has undergone great fluctuations. The import in 1872-73 was as much as 3,000,000 pieces to 4,000,000 pieces, but it has gradually fallen off. It is the grade which was intended specially to compete with the native made cloths. In late years the import of yarn has to a large extent taken its place, and so checked the development, though the demand keeps fairly steady. The Bombay mills have been sending forward a certain quantity of this class of goods, but the import does not seem to grow rapidly. The following are the figures :—

Table II.—IMPORT of T-cloths, English and Indian Manufacture.

Year.	Quantity.	
	England.	Bombay.
	Pieces.	Pieces.
1876-80, average	2,690,000	..
1881-85 "	2,071,000	..
1886-90 "	1,734,000	180,000
1891 "	1,586,000	206,000
1892 "	1,566,000	363,000
1893 "	1,500,000	227,000

Though the import of this class of goods has been gradually diminishing, it will be seen that the decline this year is insignificant compared with that in the class of shirtings. This may partly explain the fact that the rise in price has been comparatively less than in other classes.

I have in previous reports drawn attention to the strong competition which American manufacturers have been offering of late years in the large and important class of goods known as drills and sheetings. This competition appears, however, to be now subsiding, as will be seen by the following table. The American import of drills has fallen off by 50 per cent., and that of sheetings by 30

Drills and
sheetings.
American
competition.

per cent. As a consequence of this the English import has increased in spite of the enhanced prices. The combined import has on the whole decreased, but not very much.

Local
manufacture.

A more formidable competitor, however, than America is rising in the shape of local manufactures, though as yet the quantities produced are small. I shall refer to this later on, and also to the burning of the Shanghai cotton-cloth mill in October of last year, which, for the time, put an end to the output of locally made cloth. Another mill has been working for the greater part of the year in the consular district of Hankow, but its productions do not come within the scope of my report. The import of drills and sheetings from Bombay shows a fair increase. The quantities coming forward as yet are but small, but I include them in the table for purposes of comparison.

COMPARATIVE Table of Import of Drills and Sheetings.
(14 and 15 lbs., 40 yards per piece.)

DRILLS.

Year.	Imported from—			Local Manufacture.
	England.	United States of America.	Bombay.	
	Pieces.	Pieces.	Pieces.	Pieces.
1880-84, average ..	381,000	429,000	..	..
1885-89 ..	382,000	532,000	450	..
1890	266,000	592,000	80	..
1891	277,000	856,000	155	12,000
1892	154,000	638,000	420	40,000
1893	427,000	422,000	10,261	112,000*

* 9½ months' working.

SHEETINGS.

Year.	Imported from—			Local Manufacture.
	England.	United States of America.	Bombay.	
	Pieces.	Pieces.	Pieces.	Pieces.
1881-84, average ..	201,000	641,000	..	..
1885-89 ..	520,000	1,286,000	22,400	..
1890	754,000	1,203,000	54,670	..
1891	820,000	2,009,000	29,100	14,000
1892	652,000	1,314,000	50,000	60,000
1893	728,000	903,000	94,000	154,000*

* 9½ months' working.

I have already remarked upon the check which the import of Indian yarn has this year for the first time received in its rapid growth. The falling-off is as much as 30 per cent. of last year's import. As there is as yet no other supply which can take the place of Indian yarn, the import will, no doubt, for a time recover, notwithstanding the rise in price. This is an article to which the Chinese have got accustomed, and which they cannot do without at present, but as eastern manufactures develop a keen competition is bound to set in at no distant date. As a sign of the times I note for the first time the appearance of Japanese yarn in the customs returns. The imports during the last 10 years have been as follows:—

COMPARATIVE Table of Import of Cotton Yarn.

Year.	Imported from—			Local Manufacture.
	England.	Bombay.	Japan.	
	Cwts.	Cwts.	Cwts.	Cwts.
1885	78,571	54,761	..	..
1886	45,238	129,761	..	..
1887	45,238	201,190	..	..
1888	73,809	195,238	..	..
1889	29,761	251,190	..	..
1890	65,476	582,142	..	..
1891	45,238	722,619	..	9,523
1892	19,714	823,280	..	26,785
1893	21,505	580,065	2,909	42,000

There is nothing special to note in respect to other classes of cotton goods imported, farther than to remark that they have generally shared the fate of shirtings in respect to a decreased demand. Turkey reds, which come next in importance to the classes mentioned, show a falling-off of over 50 per cent. as compared with 1892. The same may be said of cotton lastings, twills, and chintzes. On the other hand, prints and figured goods, as also handkerchiefs and towels, have held their own or have increased. It is worthy of notice that Shanghai has this year imported Japanese made cotton-cloth and cotton-crape to the extent of 142,000 pieces.

Opium.

There has been a further slight falling-off in the quantity of opium imported during the year, principally in Benares drug. The price rose during the last 6 months of the year by some 26 per cent. The price of Malwa, which in January and in June was quoted at 380 taels 90 c., was 480 taels 85 c. in January, 1894. The importation into Shanghai in foreign vessels of native grown opium from other parts of Chinese shows a small increase. It has

often, however, been pointed out in previous reports, that the quantity figuring in the customs returns as imported in foreign vessels is no criterion of the amount of native grown opium consumed in this locality. The demand for Indian drug, so far as this port is concerned, has long been stationary with a tendency to retrograde.

Woollens.

Small rise
in price.

The trade in woollen goods has also, to some extent, shared the fate of the trade in cottons. There has been a rise in price of 10 per cent. to 15 per cent. in the standard articles and a consequently curtailed demand, though as this class of goods finds customers only among the well-to-do classes, the trade has been less affected by the rise than cotton goods. The import of lastings has fallen from 105,000 pieces to 76,000 pieces, and cloths, broad and Russian, show a decline of 50 per cent. Long-ells, however, show a slight increase, while other qualities have held their own.

Metals.

Metals.

The import of metals of all kinds shows no material alteration except in the item of old iron, which has decreased by some 30 per cent. The silver price of these articles does not appear to have risen. The total import of iron, exclusive of old iron, was 26,243 tons against 23,508 tons in 1892.

It is satisfactory to note that machinery to the value of 130,000*l.* has been imported against 45,000*l.* in 1892.

Kerosene oil.

The consumption of kerosene oil continues to grow rapidly; the import both of American and Russian oil showing an increase of 35 per cent. over that of last year. The import this year has been over 28,000,000 gallons, valued at 560,000*l.*

Installation
of oil tanks.

An important departure in the oil trade has to be noted this year, viz., the installation of oil tanks for the storage of petroleum in bulk, such an innovation, as was to be expected, has met with considerable opposition from Chinese officials and from persons interested in the trade in case oil, who alleged danger to the crops and contamination of water through leakage and percolation. The promoters of the scheme, however, disarmed opposition by offering a material guarantee to answer in damages any injury that might be shown to arise to life or property through the presence of the tanks. A permit to discharge the first cargo was reluctantly granted, and the work of canning and distribution has begun. It is anticipated the opposition will soon die out, and the works cannot but prove a great benefit to China both in supplying cheaper oil and in providing employment for a number of workmen.

Matches of Japanese manufacture were imported during the year to the value of 66,000*l.* as against 15,000*l.* of European make.

Trade with
Japan.

I may notice in this connection the large place which Japan

is beginning to take in the trade of China. Besides the cotton yarn and cotton piece-goods already spoken of, Japan sends large quantities of cotton woven fabrics such as socks, singlets, towels, handkerchiefs, umbrellas, soap, sulphuric acid, copper, coal, and large quantities of edible stuffs such as seaweed, fungi, &c. Already the amount of Chinese produce taken by Japan is almost as much in point of value as that taken by England. The time is probably not far distant when Japanese manufactures will enter on a serious competition with those of England and Bombay for the supply of the China market.

Exports to Japan.

Competition of Japanese manufactures with those of Bombay.

I shall advert later on to the probable expansion of local manufactures. Unless the Chinese Government gives free permission to establish cotton mills, which at present they do not seem disposed to do, there would be a wide field in China for the products of Japanese mills.

They would, as things stand at present, be handicapped by the Japanese duties now levied both on the raw material on entering, and the finished article on leaving the country, but these duties might be removed, and even if not, the difference in cost of wages and other disbursements entailed on the Bombay manufacturer by the dearer coinage, not to mention saving in freight, would probably more than compensate his Japanese rival.

Exports.

Under the influence of cheap silver the volume of exports from China to foreign countries continue to expand. 20 years ago the only Chinese exports of any consequence were the two articles of tea and silk. Between them they constituted for many years, and indeed up to about 1880, over 80 per cent. of the whole export. As the exchange value of silver fell it became profitable to export to Europe many articles which previously would not have paid costs of transport, and at the same time a very large trade has developed between China and the other silver using countries of Asia. The expansion in exports has been mainly in these miscellaneous products. The value of silk and silk products exported has grown to a moderate extent, while that of tea has greatly fallen off. The following table gives the relative progress of tea, silk, and all other products in silver values. It is understood that I am speaking of exports to foreign countries from all China, not of those from Shanghai in particular.

Exports to foreign countries.

EXPORTS from China to Foreign Countries during the
undermentioned Years.

Articles.	Value in Thousands.				
	1875.	1880.	1890.	1892.	1893.
	H. taels.	H. taels.	H. taels.	H. taels.	H. taels.
Tea	36,697	35,627	26,662	25,983	30,559
Silk	24,894	29,831	30,255	38,292	38,114
All other products..	7,321	12,425	30,327	38,308	47,959
Total ..	68,912	77,983	87,244	102,583	116,632

The silver values above given represent very closely the volume of commodities. Taking one year with another there has been but little variation in the price per ton or per cwt. as the case may be, but the tendency in recent years has been towards a rise. It is very difficult in dealing with commodities which vary in quality to determine prices with entire accuracy, but as the values above given are determined from year to year on the same principle, they may be taken as sufficiently exact to show with reasonable certainty variations extending over a long period.

The following table shows in index numbers the variations in the silver price of 15 principal articles of export as arranged from Tables A and B of my report* on silver of last year.

* F.O. Reports, Miscellaneous Series, No. 305 of 1893.

VARIATIONS in Prices of Standard Articles of Export, 1870-94. (Average 1870-74 = 100.)

Articles.		1870-74.	1875.	1880.	1885.	1886.	1887.	1888.	1889.	1890.	1891.	1892.	1893.
Silk, raw, No. 4, Tsatlee	..	100	76	79	76	91	88	86	94	88	84	97	101
" refuse ..	..	100	79	99	103	89	106	116	101	111	106	91	100
" piece-goods	..	100	131	136	93	130	111	111	112	109	110	110	113
Tea, black ..	..	100	89	76	70	70	65	66	70	77	89	80	80
" green ..	..	100	73	68	60	57	49	60	59	57	53	57	74
" brick ..	..	100	142	104	62	70	79	68	82	82	81	82	80
Beans	..	100	97	91	100	113	100	117	140	140	131	115	156
Hides, cow ..	..	100	111	152	159	139	150	125	125	103	98	103	99
Cotton, raw ..	..	100	99	97	112	105	97	107	97	97	105	97	104
Sugar, brown	..	100	106	133	103	106	104	103	102	101	101	102	125
Strawbraid ..	..	100	116	134	130	134	131	131	123	131	108	124	130
China ware ..	..	100	138	101	60	60	97	52	52	53	66	80	74
Wood..	..	100	101	106	125	150	132	130	148	133	132	146	165
Hemp	..	100	109	124	110	111	96	94	98	84	83	85	90
Tobacco, leaf	..	100	88	99	108	94	80	80	88	72	89	89	87
Total ..	..	1,500	1,555	1,599	1,471	1,539	1,455	* 1,446	1,491	1,438	1,436	1,458	1,578

SHANGHAI.

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Turning to the particular exports from Shanghai, raw silk continues to be as heretofore by far the most important article. The export of white silk during the year has rather fallen off, there being only 52,634 cwts. as against 61,429 cwts. in 1892. In regard to price the market has undergone the greatest vicissitudes. During the season 1892-93 the local price of raw silk under the combined effects of a strong European demand and a falling exchange, rose from 25 per cent to 30 per cent. "Blue Elephant" chop, which in June, 1892, was quoted 337 Sh. taels (11s. 8d. per lb.), had risen by April, 1893, to 445 Sh. taels (14s. 7d. per lb.). The result was that almost every available pound of silk in the country was brought to market, and the total export for the season was one of the largest. With the season 1893-94, however, a change set in. The European demand slackened, and owing to financial troubles in America there were few buyers for that country. At the same time silver continued to fall rapidly as the result of currency legislation in India and the United States. The result was that the gold price in Europe began to give way, and continued to drop throughout till at the end of the season it has reached the lowest point on record. The silver price in Shanghai has remained fairly steady. The effect of the fall in exchange has thus been visible only on the reduced London prices. The following monthly quotations of prices of "gold killing," which is a medium grade of raw silk, illustrate these variations:—

Month.	Prices in Shanghai Taels per Bale.	Equivalent in Sterling per lb. + 10%.		Actual London Quotations same Date.		Exchange Value of Haikwan Taels.	
		s.	d.	s.	d.	s.	d.
1893—							
June	345	11	4½	11	3	3	10½
July	350	10	7	10	3	3	6½
August	355	10	5	10	0	3	5½
September	347½	10	3	9	10	3	5½
October	337½	9	11	9	9	3	5½
November	340	9	8½	9	4½	3	4
December	337½	9	6½	9	1½	3	3½
1894—							
January	342½	9	6	9	1½	3	2½
February	347½	9	1	9	0	3	0½
March	352½	8	6½	8	0	2	9½

General
result.

From the foregoing table it will be seen how accurately the London market has followed the fall in silver. If the European demand had been stronger gold prices no doubt would have remained steadier, and in that case silver prices on this side would have risen. But a comparison of prices over a long series of years has shown that on the whole the European price has fallen with the fall in silver, and that the silver price has kept steady. Roughly speaking, the price of raw silk in silver, like the price of the great mass of the commodities, has not greatly varied; but the

price in England has fallen in the course of the last 20 years from an average of 1*l.* per lb. to 10*s.* per lb., or a fall of 50 per cent. There may, of course, have been other causes at work, but the fall in silver seems to be one of the most potent.

The export of tea from all China has somewhat recovered lost Tea. ground, and prices on the whole have been rather stronger. The Export from export was 1,716,000 piculs (1 picul = 133½ lbs.), against all China. 1,570,000 piculs in 1892.

The export of black tea from North China (that is, from Shanghai and the river ports), has been as follows for the two seasons 1892-93 and 1893-94:—

Exported to—	1893-94.	1892-93.
	Lbs.	Lbs.
Great Britain	19,870,000	23,705,000
United States and Canada ..	6,900,000	7,160,000
Russia via Odessa	22,000,000	15,423,000
Russia via Tientsin	15,693,000	8,693,000
Russian Manchuria	1,356,000	355,000
Total	65,819,000	55,336,000

As will be seen from this table, Russia has been the principal buyer. The exports to Russia in the season 1892-93 were very low, that being the famine year, and a larger demand this year was the natural result. The export to England as well as to America has considerably declined. Owing chiefly to the Russian demand, which extended to the commoner grades, prices have been fairly well maintained, and in certain cases have risen.

The fall in silver, which set in in June, has, no doubt, tended in the same direction; but its principal effect, as in the case of Effect of fall in silver on tea. silk, has been apparent in lowered prices at home. Notwithstanding lower prices, the English demand for China teas seems to slacken year by year, and according to some is threatened with complete extinction at no distant date.

Merchants are now watching with much interest the action of the Ceylon Government in currency matters. If Ceylon decides to throw in its lot with India in the matter of coinage, it is anticipated that every divergence between the natural and artificial value of the rupee will be a premium of so much in favour of China tea. It would seem that this must be the result, and though the preference of the British tea-drinker for Ceylon and Indian growths may be to a considerable degree a matter of sentiment and not of cost, it cannot be doubted that the cheaper dollar will give a decided advantage to China green tea. Action of Ceylon Government and its bearing.

The export of this class shows a large advance, being Green tea. 33,000,000 lbs., against 26,000,000 in 1892. The whole of that increase was in response to American demand both at the end of last season and during the present. Silver prices have shown in consequence a considerable rise. The export to England is apparently stationary; but the export to Bombay continues (1796)

to grow, apparently in response to a demand from Persia, Afghanistan, &c.

Of other articles of export which have made the greatest progress, I may mention raw cotton, the quantity of which sent to foreign countries during the year was 880,502 cwts., as against 753,995 cwts. in 1892. The most of this went to Japan, but within the last few months as much as 180,000 cwts. have been shipped to Europe, one-third being for Liverpool, destined, I presume, for Manchester, and the balance being for the Continent. The local price is about 12 taels per picul of 133½ lbs., equal to a laying down price in England of about 3½*d.* per lb.

Straw braid has also increased, the export being 118,000 cwts., against 101,000 cwts. in 1892.

A similar increase has to be noted in hides, skin rugs, beans, and bean-cake, and indeed in almost all the crowd of miscellaneous articles which go to make up the export of China to foreign countries.

Local Industries.—Cotton Spinning.

I have in previous reports set out the progress that has been made in the establishment of cotton mills in Shanghai. At the beginning of the year two mills were in operation—one a yarn mill of 15,000 spindles, and the other turning out both yarn and cloth with 25,000 spindles and 550 looms. Though nominally private, both companies are in reality official owned, and claiming to work under a special license from the Government, which gave them a monopoly for a term of years, they endeavoured to keep out all competitors, both foreign and native.

In October last the cloth mill was accidentally burned, and being uninsured, the owners lost thereby a large sum of money. Steps, however, were at once taken to have the mill rebuilt, and an order for fresh machinery was sent to England without delay. It is expected that in a few months' time the mill will be again ready to begin working, and with largely augmented machinery. There will be when completed 100,000 spindles and 1,500 looms. The event, however, seems to have induced the promoters to change their tactics. Instead of endeavouring to keep a monopoly of the right to manufacture cloth and yarn, they seem to think it will pay better to allow others to join on condition of their paying a royalty or percentage on their output to the owners of the Pioneer Mill. The percentage demanded is said to be 1 tael per bale of yarn produced, which at present prices would be a levy of only about 1½ per cent. on the output. With a certain profit of some 10 taels to 12 taels per bale this is not a serious demand, and accordingly a great number of Chinese capitalists are desirous of engaging in the business. Certain other unwelcome conditions, however, appear to be attached, and there is a widespread distrust and apprehension that the levy of 1 tael per bale would not necessarily be the limit of official interference. So far, therefore, only three new mills, besides the burnt out one, have been contracted for; but even with

these a respectable beginning will have been made. By the end of the year at least 150,000 spindles will be running in Shanghai, besides those at Hankow, working under the auspices of the Viceroy Chang Chih Tung. So far no foreign firm has succeeded in taking part in cotton-spinning.

Foreign merchants claim the right under treaty to engage at the open ports in cotton manufacture as in any other industry. This right is steadily denied by the Chinese Government, who have gone so far as to issue orders to all their custom-house officers not to permit even the landing of cotton machinery unless accompanied by a special certificate permitting its importation.

Foreign merchants still denied the right of engaging. Method adopted by Chinese Government to prevent them.

All merchants, of whatever nationality, have joined in protesting against this unwarranted limitation on the ground that whatever may be said of the right to manufacture, the right to import machinery, like all other articles whatsoever not expressly forbidden, is secured by the terms of the treaties.

Nevertheless, the Chinese Government maintain that the manufacture of cotton by foreigners would be an interference with the means of livelihood of the Chinese population, and on that ground they seem resolved to keep us out.

Plea of Chinese Government.

There is no doubt that the Chinese are now missing a golden opportunity. It would be to their interest not merely to permit, but to encourage by every means in their power the establishment of industries, cotton especially, and to promote the inflow of foreign capital, which is what the country wants. So long as it pleases them to pay some 4,000,000*l.* or 5,000,000*l.* per year for yarn and cottons which they might just as well make themselves, so much the better for us and for Bombay. The manufacturer of machinery loses a market perhaps, but Manchester gains.

The question is, how long it will last? That again depends upon the question how long silver will remain at its present low rate. If the present price of silver becomes permanent, I apprehend that the percentage of profit on manufacturing cotton will be so great that a great development will follow. At present there is so much uncertainty attending the future of silver that men will not risk any large amount on undertakings of this nature. Should silver go back to anything near its old ratio, the profits on local mills would pro tanto disappear, and besides, future mills would be able to buy their machinery much cheaper. Persons, therefore, who had already purchased, would be handicapped against subsequent enterprises.

Influence of silver.

At the moment the Chinese Government seems resolved to keep the development of the cotton industry within small limits, but in a country like this, it is so often the unlikely that happens that no one can say what will take place. One thing is certain, and that is, that the Chinese, if they do open the door to cotton manufacture on a large scale, will be very serious competitors both to Bombay and to Lancashire. There would of course be gains to us in other directions, and it might be that trade with Great Britain would, on the whole, gain more than it would lose. New lines

Bombay and Lancashire.

would be opened out as the country became wealthier, but anyhow, there would be a serious disturbance of the existing course of trade.

Silk Filatures.

Industries
connected
with silk.

It is satisfactory to have to record the addition during the year of two new establishments for the reeling of silk from cocoons by foreign machinery. It has always been a matter of regret that the Chinese Government have not been more liberal in the encouragement of improved methods for the production of silk, which is and always will be an inexhaustible source of wealth to the country. It has often been pointed out how much the Japanese Government has done in this direction, with the result that the value of silk annually exported from that country has increased tenfold. In China, where all the natural advantages are on her side, the Government have done nothing, and have even thrown and continue to throw obstacles in the way of those foreigners who sought to introduce new methods. It is even yet, I believe, forbidden to erect any foreign machinery in the interior where the silkworms are reared, and consequently the filatures are limited to the foreign settlements. The cocoons have to be bought, dried, and prepared within a short space of time, and at districts in the interior where no proper appliances exist, and the foreign buyers are often subject to delays and inconveniences through the interference of officials.

foreign
filatures.

Notwithstanding these obstacles the foreign filatures are proving successful, with the result, as I have said, that additional ventures of the kind are being erected. Silk prepared in this way commands a much better price than ordinary China reelings, being indeed the finest silk that the world produces. The result is entirely to the advantage of China, inasmuch as it enhances the value of her exports and puts her in a better position as regards the balance of trade.

Waste silk.

Machinery for the preparation of waste silk has also, to a small extent been introduced, and ought to be farther encouraged. Large quantities of silk refuse which formerly was only used for wadding, or was even thrown away, can now be prepared by improved machinery and spun into yarn. Cheap silver has made this quite a large article of export, but its value to China might be made much greater if it were treated in the country and exported in the form of yarn rather than in bales of waste.

If the Chinese Government were alive to their own advantages, they would encourage all such industries and welcome the investment of foreign capital for these and other like purposes.

Foreign
capital.

The present low price of silver presents a probably unique opportunity for laying down foreign capital in China on favourable terms. If the Chinese Government were disposed to come into the European market as a borrower for railways or other public works, they could do so on most satisfactory terms. A gold loan

would yield them in silver about double the old amount, and such a loan well spent would not merely repay itself in interest, but it would, like a fertilising stream, so stimulate the exports of China that there would soon be a large annual balance in her favour which would induce a steady flow of silver into the country to the relief of the West and to her own very great advantage.

Surplus silver of the West could all be absorbed here if Chinese Government would only permit.

Or if, contenting herself with minor benefits, China could only show herself a little more favourably disposed towards foreign innovations, if she would only assure to industries protection and freedom from vexatious interference, a good deal might be done in the introduction of foreign capital through private enterprise. Besides cotton spinning, of which I have spoken, there are numerous industries which, in view of the relatively very low rates of wages now prevailing in the East, might be carried on with great profit. Some of these, such as the manufacture of matches, soap, paper, &c., are beginning to take root, but until the Government shows itself more benevolent, it is not to be expected that there will be much opening for European capital.

Minor industries beginning to take root.

If China were only fairly open to foreign enterprise, there is room here for all the surplus silver of the world for many years to come.

Movements of Treasure.

The following are the movements of the precious metals during the year :—

1.—ENTERING and Leaving the Port of Shanghai by Sea.

IMPORTS.

From—	Gold.		Silver.	
	In Bars.	In Coin.	Bullion.	In Mexican Dollars.
Foreign countries ..	H. taels. 210,000	H. taels. 250,000	H. taels. 8,078,000	H. taels. 7,525,000
Chinese ports—				
Tientsin	2,074,000	..	1,238,000	98,000
Newchwang	1,291,000	..	30,000	8,000
Chefoo	762,000	..	1,111,000	183,000
Corea	291,000	..	12,000	24,000
Other ports	136,000	..	1,921,000	3,750,000
Total	4,764,000	250,000	12,390,000	11,588,000

EXPORTS.

To—	Gold.		Silver.	
	In Bars.	In Coin.	Bullion.	In Mexican Dollars.
Foreign countries ..	H. taels. 7,873,000	H. taels. 1,000	H. taels. 659,000	H. taels. 3,471,000
Other Chinese ports ..	8,000	..	10,072,000	1,285,000
Total	7,881,000	1,000	10,731,000	4,756,000

TABLE showing Net Import of Silver and Export of Gold at Shanghai.

	Amount.	
	Currency.	Sterling.
	H. taels.	£
Net export of gold to foreign countries, chiefly Europe ..	7,414,000	1,461,000
Net import of silver	11,473,000	2,261,000

It will be seen from the above table that nearly all the imports of gold came from the northern ports of China, and little or none from the west or south. This lends colour to the theory that a considerable proportion of the total export of gold from China is the produce of mines in Manchuria or along the Corean Frontier.

2.—The net movements of treasure between China as a whole and foreign countries during 1893 was as follows :—

TABLE showing Net Export of Gold and Import of Silver for all China.

	Amount.	
	Currency.	Sterling.
	H. taels.	£
Gold, net export	7,459,000	1,468,000
Silver, net import	10,804,000	2,127,000

The difference 3,345,000 Haikwan taels (660,000*l.*) may be taken as representing the balance accruing to China on the year's trade.

Appended are the usual tables

**Annex II.—RETURN of Principal Foreign Articles of Import
to Shanghai during the Years 1892–93.**

Articles.		1892.†		1893.‡		
		Quantity.	Value.	Quantity.	Value.	Sterling.
			H. taels.		H. taels.	£
Opium—						
Malwa	Cwts. ...	25,069	8,002,306	25,466	10,653,933	2,097,000
Patna	" ...	10,002	2,814,754	9,697	3,706,940	729,800
Benares	" ...	7,280	2,030,645	5,884	2,267,766	446,500
Persian	" ...	332	75,540	30	9,750	1,900
Cotton goods:—						
Shirtings—						
Grey	Pieces* ...	6,117,642	10,398,992	3,997,271	7,994,542	1,574,500
White	" ...	1,567,411	2,899,711	1,223,510	2,569,358	506,000
Dyed plain	" ...	131,040	314,496	25,958	70,086	13,800
Figured	" ...	43,138	86,376	119,408	262,698	51,800
T-cloths—						
English	" ...	1,372,873	1,652,061	978,026	1,326,269	261,000
Bombay	" ...	363,148	368,816	227,151	277,416	54,000
Drills—						
English	" ...	164,716	809,430	427,092	981,292	193,000
American	" ...	688,457	1,436,523	422,700	1,099,000	216,400
Dutch	" ...	34,680	53,020	63,120	113,616	22,500
Bombay	" ...	430	924	10,251	24,821	4,900
Jeans—						
English	" ...	123,767	191,839	92,194	166,149	32,700
Dutch	" ...	16,220	25,295	26,660	50,654	10,000
American	" ...	18,000	30,600	24,000	48,000	9,400
Sheetings—						
English	" ...	652,931	1,338,509	728,258	1,674,993	330,000
American	" ...	1,314,615	3,156,000	903,335	2,439,005	480,000
Bombay	" ...	50,905	96,720	93,690	206,118	40,500
Chintzes and furnitures	" ...	62,566	62,586	47,000	61,004	12,000
Cotton prints, plain	" ...	267,036	495,500	355,611	497,715	98,000
Twill, printed	" ...	150,074	380,143	114,511	240,473	47,500
Turkey-reds	" ...	344,948	436,691	157,515	203,883	43,000
Cotton lastings	" ...	368,188	920,471	280,835	744,477	146,600
" Italians	" ...	130,274	214,156	201,142	484,338	95,000
Velvets and velveteens	" ...	41,714	272,065	48,687	284,682	56,800
Cotton handkerchiefs	Dozens ...	573,240	229,310	515,245	229,292	45,700
" towels	" ...	608,454	153,827	803,296	223,084	44,500
Cotton yarn—						
English	Cwts. ...	19,704	331,041	21,605	415,517	82,900
Bombay	" ...	823,280	11,064,904	580,065	8,283,344	1,631,800
Japanese	" ...	...	...	2,909	49,569	9,600
Woolen goods—						
Camlets	Pieces ...	69,324	596,186	68,788	701,434	138,000
Lastings	" ...	105,840	711,652	76,206	619,968	122,000
Long ells	" ...	76,550	348,303	86,780	433,900	85,000
Spanish stripes	" ...	49,543	470,659	46,092	437,874	86,200
Cloth—						
Broad, medium, and habit	" ...	14,461	289,220	7,493	149,800	29,500
Russian	" ...	20,854	512,006	8,204	201,818	40,300
Italian, plain and figured	" ...	73,443	412,537	113,958	666,384	131,200
Lusures and Orleans, plain and figured	" ...	12,656	35,224	11,372	36,472	7,200
Flannels	" ...	4,443	44,460	5,092	51,343	10,100
Metals:—						
Iron—						
Nail rod	Cwts. ...	258,760	391,247	277,696	443,206	87,300
Bar	" ...	102,182	167,376	70,294	124,003	24,400
Plates	" ...	35,059	73,166	43,704	137,767	27,700
Wire	" ...	65,327	208,537	61,072	164,711	32,500
Pig	" ...	108,313	104,630	72,078	78,711	15,500
Old iron, all sorts	" ...	611,071	571,825	392,307	383,719	75,500
Tin, in slabs	" ...	49,894	1,089,698	49,673	1,168,345	230,000
Lead, in pigs	" ...	148,228	429,579	105,194	318,108	62,500
Copper slabs, Japanese	" ...	26,901	311,838	30,038	348,225	68,500
Steel bars	" ...	27,939	81,721	40,535	163,441	32,000
Sundries—						
Coal	" ...	7,508,300	1,667,075	7,139,780	1,784,945	351,600
Dyes, aniline	" ...	...	760,835	...	773,186	152,300
Ginseng, American	Cwts. ...	1,161	273,258	1,157	272,160	53,600
Glass windows	Boxes ...	44,328	101,943	84,817	227,467	44,700
Glassware	Cwts. ...	4,663	89,171	4,272	128,284	25,200
Machinery	" ...	...	225,709	...	651,453	132,000
Matches—						
European	Gross ...	625,919	176,452	218,733	76,088	15,000
Japanese	" ...	1,322,397	225,173	1,839,415	332,474	65,500

RETURN of Principal Foreign Articles of Import to Shanghai
during the Years 1892-93—continued.

Articles.			1892.		1893.		
			Quantity.	Value.	Quantity.	Value.	Sterling.
Medicines, foreign ...	Cwts. ...	...	...	H. taels.	...	H. taels.	£
Needles ...	Mille ...	1,894,047	...	81,293	17,713	191,383	37,600
Oil, kerosene—	...	...	...	259,177	2,231,001	319,457	63,000
American ...	Gallons...	17,191,400	1,640,917	23,619,005	2,332,408	460,000	
Russian ...	" ...	3,386,476	345,336	5,132,045	483,475	95,000	
Railway plant and materials ...	...	...	138,184	...	64,980	12,700	
Seaweed, Japanese ...	Cwts. ...	455,736	716,365	398,041	716,602	141,000	
Soap ...	Boxes ...	205,047	216,692	...	...	...	
" ...	Cwts. ...	...	...	91,676	355,788	70,000	
Telegraphic materials...	...	...	103,711	...	112,496	22,000	
Timber, soft wood planks ...	Sq feet...	14,973,009	269,514	16,563,370	298,160	58,600	
Sugar ...	Cwts. ...	295,235	1,169,394	1,357,040	5,342,037	1,051,500	
Watches ...	Pieces ...	29,384	112,261	17,802	78,186	15,400	
Unenumerated ...	...	...	13,267,629	...	16,068,809	2,968,500	
Total ...	...	...	...	78,777,426	...	83,974,245	16,542,000

Pieces of 40 yds.

† Exchange at 4s. 4½d. to the tael.

‡ Exchange at 3s. 11½d. to the tael.

Annex III.—RETURN of Principal Articles of Native Import to Shanghai during the Years 1892–93.

Articles.			1892.		1893.		
			Quantity.	Value.	Quantity.	Value.	Sterling.
Silk:—				H. taels.		H. taels.	£
Raw—							
White	Cwts.	...	1,154	218,157	1,885	324,853	63,955
Yellow	"	...	12,376	2,339,091	17,227	2,965,623	584,053
Wild	"	...	10,261	810,324	7,995	772,370	152,060
Cocoons	"	...	870	86,553	2,191	106,810	21,023
Waste	"	...	27,847	943,697	42,295	1,305,961	257,111
Piece-goods	"	...	2,651	1,336,068	3,166	1,596,204	314,252
Pongees	"	...	3,244	435,955	3,405	457,771	90,124
Tea—							
Black	"	...	329,445	5,534,679	360,011	4,838,562	952,592
Green	"	...	225,163	3,593,607	284,772	5,741,020	1,130,264
Brick	"	...	315,983	2,123,407	403,882	2,311,831	455,142
Opium, native	"	...	2,525	608,014	2,936	830,323	163,479
Sundries:—							
Beans	"	...	667,621	448,642	812,820	655,458	129,043
China-ware	"	...	599,927	670,953	963,863	1,105,935	217,731
Cloth, native	"	...	38,469	512,217	42,282	592,011	116,552
Coal	"	...	8,193	275,516	8,152	273,945	53,933
Cotton, raw	"	...	879,260	162,663	733,700	209,105	41,163
Fungus	"	...	40,235	337,990	116,009	1,042,694	203,230
Grass cloth	"	...	19,988	369,393	24,316	402,392	79,221
Hemp	"	...	5,482	272,245	4,711	250,470	49,312
Hides	"	...	147,701	769,227	168,739	826,718	162,760
Medicines	"	...	69,561	419,016	91,172	630,753	124,179
Oil, wood	"	...	245,007	1,542,929	217,033	1,369,324	269,585
Paper	"	...	130,257	522,166	121,905	532,490	104,834
Rice	"	...	196,280	1,876,254	187,455	1,748,277	344,192
Skins—			1,597,252	2,012,538	2,206,115	2,599,763	511,823
Rugs	Pieces	...	790,598	735,876	1,008,168	909,681	179,094
Furs	"	...	...	...	2,857,283	421,128	82,909
Straw-braid	Cwts.	...	93,193	1,837,876	113,571	2,315,897	455,942
Sugar—							
Brown	"	...	987,704	2,074,179	434,029	1,312,508	253,400
White	"	...	475,841	1,638,304	287,986	1,403,073	276,230
Candy	"	...	54,754	374,185	24,870	196,382	39,663
Tallow, vegetable	"	...	66,729	403,586	101,013	610,927	120,276
Tobacco	"	...	162,550	1,904,865	226,059	2,230,625	439,155
Varnish	"	...	10,313	327,021	11,088	325,993	64,180
Vermicelli	"	...	109,244	376,238	100,638	338,144	66,572
Wax	"	...	11,295	478,359	14,428	1,451,315	285,728
Wool—							
Camels'	"	...	25,091	207,423	33,838	279,077	54,943
Sheep's	"	...	156,214	1,180,984	126,583	1,063,300	209,338
Unenumerated articles	"	...	...	9,427,557	...	...	1,760,851
Total			...	49,190,079	...	55,293,713	10,885,950

Annex IV.—RETURN of Principal Articles of Export from Shanghai during the Years 1892–93.

Articles.			1892.		1893.		
			Quantity.	Value.	Quantity.	Value.	Sterling.*
				H. taels.		H. taels.	
Silk :—							
Raw—							
White...	Cwts.	61,429	15,723,653	52,634	13,764,532	2,710,000	
Yellow...	"	11,361	2,147,434	15,993	2,765,169	542,400	
Wild...	"	10,919	862,223	7,133	693,910	136,600	
Cocoons...	"	3,947	166,738	3,198	339,448	73,700	
Waste...	"	47,455	1,594,543	43,366	1,706,396	333,900	
Piece-goods...	"	13,276	6,691,362	16,401	3,266,470	1,627,500	
Pongees...	"	2,934	394,495	2,704	363,571	71,600	
Tea—							
Black...	"	321,105	5,415,540	334,927	4,547,428	895,500	
Green...	"	223,303	3,431,454	278,657	5,651,087	1,112,500	
Dust...	"	1,035	6,221	3,100	19,534	3,800	
Brick...	"	335,402	2,253,911	421,320	2,477,367	487,700	
Leaf...	"	1,815	13,306	986	9,957	2,000	
Sundries :—							
Beancake...	"	464,371	312,067	529,400	426,907	84,000	
Beans and peas...	"	493,275	596,842	867,339	1,005,421	193,000	
Books, printed...	"	6,091	230,307	7,700	291,113	57,300	
Chinaaware...	"	39,119	522,386	40,488	564,373	111,000	
Cloth, native...	"	40,138	1,348,662	39,459	1,325,841	261,000	
Cotton, raw...	"	753,955	6,333,233	880,509	7,914,023	1,588,000	
Grasscloth...	"	6,173	284,533	4,515	214,058	42,100	
Hemp...	"	126,114	656,808	131,559	685,166	135,000	
Hides...	"	60,961	409,670	89,544	609,437	120,000	
Medicines...	"	221,663	1,213,324	183,917	1,091,686	215,000	
Musk...	"	40	334,632	...	434,099	85,500	
Nut galls...	"	47,396	482,800	57,900	583,640	115,000	
Paper...	"	187,665	1,585,230	188,647	1,618,102	319,000	
Rice...	"	3,013,392	3,796,727	2,507,023	2,948,259	580,500	
„ duty free...	"	1,176,197	1,482,010	1,739,942	2,046,174	402,800	
„ tribute...	"	1,133,201	1,490,834	857,925	1,008,920	198,500	
Skins and skin rugs...	Pieces	785,592	703,303	999,868	893,228	177,000	
Skins, furs...	"	...	...	2,752,958	415,232	82,000	
Straw-braid...	"	101,771	2,005,861	118,345	2,406,376	47,400	
Sugar—							
Brown...	Cwts.	556,776	1,169,232	117,902	439,718	86,500	
White...	"	405,236	1,395,637	208,859	1,017,568	200,300	
Tobacco...	"	76,404	918,513	124,229	1,231,876	242,500	
Vermicelli...	"	77,634	267,375	98,282	330,232	65,000	
Wax, white...	"	9,545	449,059	9,559	1,095,402	215,600	
Wheat...	"	1,471,354	1,606,720	1,450,286	1,593,715	312,000	
Wool—							
Camels'...	"	29,348	241,683	23,996	240,273	47,300	
Sheep's...	"	171,178	1,266,043	13,491	963,403	190,500	

* Exchange at Rs. 11½d. to the tael.

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COLOMBIA.

REPORT FOR THE YEAR 1893

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COLOMBIA.

PANAMA.

Acting-Consul Leay to the Earl of Kimberley.

My Lord,

Panama, April 30, 1894.

I HAVE the honour to transmit to your Lordship a Report on the Trade and Commerce of the Isthmus of Panama for the year 1893.

I have, &c.

(Signed) FRED. P. LEAY.

Report on the Trade and Commerce of Panama for the Year 1893.

ABSTRACT of Contents.

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Introductory Remarks.

Apart from those special conditions following upon the collapse of work on the Interoceanic Canal, to which allusion has been made in previous reports, and which so seriously affected the commerce of this department, Panama has had its share of the general depression that has prevailed throughout the world during (1773)

Depression in trade.

Signs of improvement. the past year or two. Such signs of improvement as may be noted are in promise rather than fact, and dependent for fulfilment on industrial enterprises not yet carried beyond the experimental stage.

Lack of reliable statistics. The difficulties existing in obtaining proper and reliable statistics prevent to a great extent the attaching of precise official value to the existing exports and imports, especially the latter. In

Valuations, 2s. to the Colombian dollar. the valuations the figures are taken at the rate of 2s. to the silver dollar of Colombia, this being the average for the past year, although at the present date gold exchange rules as high as 110 per cent. premium, and with an upward tendency which is

Depreciation of silver. principally due to the depreciation of silver in the markets of the world, and to the absence of regular banking establishments. It is probable that the high rate of exchange will not be very appreciably reduced until the industrial development is such as to afford national products for shipment against which bill of exchange may be drawn to an extent to control the local money market.

Monetary. The new law, No. 93 of 1892, passed in December of that year, establishes a new plan for the regularisation of the monetary system of the Republic. This law is made to secure an increase of the revenues in metallic currency to provide ways and means for the redemption of the national notes now in circulation in the other eight departments of the Republic. But in this department only the silver currency is in circulation, and no fixed rate of exchange is to be counted on, principally because, as already stated, there are no regular banks. The whole money market is in the hands of brokers, who act together for the best mutual advantage. The fluctuations in the prices for bills of exchange have varied from 78 to 102 per cent. on London.

Want of banks.

Returns. There are 8 returns submitted herewith, of which 2 are compiled from statistics gathered from the Chamber of Commerce of this City.

Imports.

Value of. The estimated imports for the year, as gathered and given by the Chamber of Commerce, amounted to 1,603,012 dol. (160,301l. 4s. sterling).

Coals. During the year the importation of coal to this port amounted to 2,990 tons from England, and 2,346 tons from New South Wales.

British trade. British trade is represented by woollens, printed cottons, linens, cotton goods, boots, hats, and liquors. From Germany—cheap cotton goods and spirits. From France—wines, liquors, and canned goods. From the United States—food-stuffs, hardware, dry goods, and beer. From Nova Scotia—fish-stuffs.

From Germany.
From France.
From United States.
From Nova Scotia.

Exports.

The exports were 668,906 dol., or 66,890l. 12s. In connection with this item it is to be noted that imported articles of foreign

production exported from the Isthmus to other ports of the Republic are treated as though direct from foreign countries, and have therefore to pay the same duties as are levied on such direct importations.

The exports of native products (Annex H) were principally to the United States, except the items of mahogany and cocobolo, which continued to be shipped to the English markets. Native products. Woods.

Rubber has appreciably dwindled, principally owing to the working out and destruction of the trees in near forests, the cost of production increasing with the increased distance. Rubber decreased.

The quantity of pearls shipped is not procurable, but there has been some movement at the fisheries, as noted elsewhere in this report. Pearls.

Bananas continue to form a staple article of export to the United States, the shipments for the last two years being :— Bananas.

Year.					Quantity.	Value.
					Tons.	£
1892	..	..	..	..	13,178	17,435
1893	..	..	..	..	13,060	18,284

Shipping.

The shipping records of this port will be found in Annex G. British steam, although increased by fifteen vessels, showed only 422 tons more than the previous year, which was due to the placing, by the Pacific Steam Navigation Company, of a line of small coasting steamers. British steamers.

There was an increase of American tonnage to this port of 33,930 tons, by the establishment of the "North American Navigation Company," plying between San Francisco and Panama. American.

Six German steamers plying to Darien ports for mahogany added an aggregate of 7,270 tons to the port. German.

On the Atlantic there have been notable changes also in the ocean steamship services. Changes.

The dispute over the division of the income from the American transit, between the Panama Railroad and Pacific Mail Companies, resulted in the former taking over, on charter-party, the three Atlantic liners of the latter plying on the direct New York-Colon route, and running them as "The Colombian (P.R.R.) Steamship Company." Panama Railroad opposes Pacific Mail.

The establishment of "The North American Navigation Company" was also procured by the Panama Railroad, but the experiment has not proved prosperous, and is expected to be shortly abandoned, leaving the North Pacific trade in the hands of the Pacific Mail. A new line of steamers.

Latterly an Italian line of steamers, plying between Genoa and Colon via West Indian and coast ports, has been established, but it is yet too early to say whether it will prove prosperous or not. An Italian line.

Port rates. Steamship companies trading to the ports of the Isthmus of Panama are now charged three rates of taxation as follows:—

		Per Month.	
		Currency.	Sterling.
		Dollars.	£ s. d.
Four steamers or more..	..	100	10 0 0
Three steamers ..	..	75	7 10 0
Two steamers or less ..	..	50	5 0 0

Lighthouses.

At Point Toro. A new lighthouse recently constructed on Point Toro, on the western side of Colon Harbour or Limón Bay (situated in 9° 22½' north latitude, and 79° 57' west longitude) was put into service on November 1st. It is a white revolving light, visible, in clear weather, at a distance of twenty-one miles. The flashes have an interval of five seconds with a duration of thirty seconds.

Charges. The increase on the port charges for this light is 5 c. (1¼d.) for each of the first one hundred tons register, and one half that amount for each additional ton. Coastal traders pay one half these rates, and ships of war are exempt.

At Isla Grande. A lighthouse is now being built on Isla Grande, opposite Manzanillo Point (9° 39' N. and 79° 35' W.). The light, which will be a white revolving one of the 3rd order and visible at about twenty-four nautical miles, will be opened about the 1st of May next.

Revenues.

Decrease in. The annual revenue of the Department continues steadily to decrease, despite the strenuous efforts that are constantly being made to provide new sources and to effect economies in expenditures.

Gross. According to the latest official estimate, the gross revenues are 1,346,948 dol. (134,694l. 16s.)

House tax. The house tax is fixed at 8 per cent. on the annual rental valuation. Cattle pay 8 dol. (16s.) per head, on all killed. The Slaughter tax. taxes of the department are generally collected in the form of monopolies granted individuals, or by the sale of the privilege of collection, awarded to the highest bidder, under sealed tender.

Tobacco, increased duties. The increased duties on tobacco and cigars have caused a heavy diminution in the total value of the imports of these articles. The duty on tobacco and cigars have been increased to 8 dol. (16s.) per kilo, gross weight, which is equivalent to a prohibitory tax.

Increase liquor tax. The taxes on liquors have been again subject to increase, and several articles added to the list.

The new tariff almost prohibitory. The new tariff is as follows:—Alcohol 25 c. (6¼d.); spirituous liquors, as brandies, whiskeys, gin, rum, &c., 10 c.

(2½¢) per kilo., gross weight, of package in which imported. Besides the "taxes" on imported liquors, which amount to an import duty although the Isthmian ports are nominally free, there are also heavy commercial contributions exacted which combine to render the liquor trade tax as prohibitory as that on tobacco.

This, in connection with the fact that local industries are fostered by law, has given rise to a new industry that promises to modify the expected revenue from the liquor tax. An enterprising English resident has, in association with some native gentlemen of this city and Carthagena, established a distillery for the manufacture, from imported raw material and refined native alcohol, of fine and fancy liquors of every description. As native manufactures and products of all descriptions are exempt from import duties in the custom-houses of the departments, and as the local taxes above quoted are avoided, these products can be shipped to all points in the Republic, and placed on the local market at one-fourth the cost of the imported articles.

There is a heavy excise or contribution on distilleries; the privilege for the collection of which is annually sold under sealed tender, and which may under certain conditions affect the prospects of the new industry, but this may be avoided by the promoters themselves securing the privilege.

Monopolies.

Owing to the continued depression in all classes of business, the financial importance to the Treasury of the monopolies has decreased considerably.

The opium privilege now pays only 14,000 dol. (1,400%) per annum, as against 2,133% in more prosperous years, say 1890.

Ice of native manufacture now only pays 12,000 dol. (1,200%), being a reduction of 33,000 dol. (3,300%) on the amount of the contribution fixed by the contract. This article is now much improved in quality, but the price remains at 5 c. (1¼¢) per pound.

Salt is also a monopoly as a national product, and is of good quality and cheap.

Gambling is still countenanced, but is on the wane owing to the falling off in patronage. The annual license from the gambling concession is about 16,000 dol. (1,600%).

The local Panama Lottery, a stock company, continues to enjoy exclusive privilege, all foreign lottery business being strictly prohibited, but has nevertheless found it necessary to reduce its regular weekly prizes, owing to the stringency.

The Government has established a monopoly of the cigarette trade, and the importation of this article, or tobacco suitable for making same, is prohibited under heavy penalty.

Mining.

No notable new departures have been made in mining industry save the exploitation and development of manganese mines. (1773)

which there are twelve in the department, seven of these belong to an American company and are situated about fifty miles north-east of Colon. The names of these properties are—Viento Frio; Carano; Nispero; Baltimore; Filadelfia; Soledad; Portobelo. They are the only manganese mines under development. They are situated at a distance of six miles from the coast, and to facilitate the transportation of ore a narrow gauge railway is now in course of construction and is expected to be completed within six months. The railway will connect the mines with the port of Viento Frio, where the ore will be loaded into sailing vessels by the means of lighters. The examining engineers estimated that fully 60,000 tons of ore-yielding more than 50 per cent. were in sight. A small steam vessel to maintain communication with Colon has been recently imported.

Gold and
other mines.

Besides the manganese mines, during the years 1890, 1891 and 1892, the mining tax was paid on sixty gold mines, and one of gold, silver and lead.

Darien Gold
Mining
Company.

Of the sixty gold mines only eleven were worked, and nine of these are comprised in the property of the "Darien Gold Mining Company," of London, in Darien, and better known as the "Cana Mines." They are situated at a distance of forty-eight miles from the coast port of El Real, and are only accessible over a road that is in very bad condition.

Working at a
loss.

While this is the most important mining enterprise in the department, for various reasons it has hitherto been worked at an actual loss. For instance, during 1892 there were eighty-three men constantly employed for 262 days at a working expense of 50,697 dol. (5,069*l.* 14*s.*), but as the quantity of mineral obtained was only 10,480 tons, valued at 3 dol. (1*s.* 6*d.*) per ton, the loss to the company for the year was 19,257 dol. (1,925*l.* 14*s.*). Already the company has expended on these mines 650,000 dol. (65,000*l.*) without encouraging results, the total product not exceeding 3,810 *ózs.*, worth about 70,000 dol. (7,000*l.*). At present there are thirty-five men employed under the direction of an English engineer, and hopes are still entertained of great results. The various properties consist of El Rey, Veta Madre del Espiritu Santo, Santa Rita, San Jose, Santa Rosa, Santo Tomas, San Jorge, San Juan, and Sacramento.

El Rey.

Espiritu
Santo.

Up to the close of 1892 work had been exclusively carried on at the "El Rey" mine, which had been worked to a depth of 270 feet. At that time it was deemed advisable to close it down and the "Espiritu Santo" was taken in hand in the spring of 1893, further capital having been raised to explore this property. This is believed to be the mine from which the Spaniards extracted immense amounts of gold. The preliminary works have given great promise, but as the old works are very heavily watered, attention is at present devoted to the construction of an adit or drain-tunnel which will un-water the workings to a considerable depth, and allow full exploration of the mine to be conducted, and the value of further developments to be determined. It is not

Annex H.—TABLE showing Principal Articles of Native Product
Exported from Panama during the Year 1893.

Articles.					Quantity.	Value.
						£ s.
Woods*..	..	..	Tons	..	1,861	7,020 0
Mother-of-pearl	..	..	"	..	261	8,184 16
Ivory nuts	..	..	"	..	548	2,192 0
Rubber ..	..	..	"	..	165	22,280 0
Sarsaparilla	..	..	"	..	25	1,427 0
Balsam ..	..	..	"	..	3	318 0
Hides ..	..	..	Lbs.	..	449,639	4,496 0
Skins ..	..	..	"	..	53,450	2,405 0
Coffee ..	..	..	"	..	54,527	2,181 0
Cocoa ..	..	..	"	..	11,207	224 0
Total value	..	..	..	..	..	50,727 16

* Principally mahogany.

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expected that the tunnel will be completed before May or June of the present year, so that the drainage may not be effected before the end of the year.

It is believed that then, one of the most interesting of the old Spanish mines will be opened up and made available for deep working by modern appliances, but should this expectation meet with disappointment, the probability is that the whole enterprise will be abandoned. One of the most interesting of the old mines.

In the Yavissa district, some 50 or 60 miles further up the Tuyra River, other mines are being developed on a small scale by private enterprises, and, as far as can be judged by their assay values, they are likely to add greatly to the future gold production of the department. Other promising mines.

The climate in the mining regions is most salubrious, the altitude of Cana, for instance, being 2,200 feet above sea level, while the temperature varies from 62° (Fahr.) at night, to 82° (Fahr.) in the day time. Serious fevers are almost unknown, and there has been no mortality from this cause during the last two years. Climate of Darien.

Another British Company, the "Colombian Quartz Mining Company, Limited," was recently formed in London to acquire a group of gold mines near Santiago de Veraguas, in the province of Veraguas. The capital of this company is 200,000*l.*, only half of which has been issued. The property is a very extensive one, containing upwards of 8 miles of gold veins, the main lode of which has been traced for several miles, showing an average width of 12 feet, and an average yield of 13 dwts. to the ton. During past years a great deal of work was done on these mines by the Indians as well as the Spaniards. Already the Company has constructed 33 miles of cart-road in addition to a large amount of prospecting. To show from the work already done, there are upwards of 400 tons of ore lying on the dump, and the mines are now sufficiently opened up to yield 2,000 tons per month if properly worked. There is in course of erection a plant to treat 20 tons daily, and if its results prove satisfactory, arrangements will be carried out for a plant to work 100 tons a day during next year. This whole district has been very little prospected, but so far as is known it holds out great prospects to enterprise and capital. Further British enterprise.

Labour is cheap, water-power generally is easy to obtain, and heavy machinery can be transported from the coast on ox carts.

The gold mine at Las Cascadas, mentioned in previous reports, has, so far, not been very actively worked, owing to various causes, but it is announced that active operations are about being resumed. Las Cascadas mine.

The gold, silver, and lead mine, known as "El Gallo," and El Gallo, which is situated in the district of "Las Minas," province of Los Santos, has not yet been worked.

Between the 18th of February, 1892, and the 24th of August, 1893, fifty-five mines were denounced to the authorities in this department, as follows: twenty-six gold, eighteen manganese, Mines denounced.

seven gold and silver, two silver, and two copper. Of this number, twenty-four claims have been made good, and the proper titles have been issued by the authorities to the respective claimants.

Pearl Fisheries.

Fishing grounds.	Some activity has been noted in the pearl fisheries, but was of a rather desultory sort, the only points where the fishing is now allowed being the islands near the coast of Chiriqui and the Pearl Islands, in the Gulf of Panama, the space embraced being between Points Burica and Mariatio, with all islands lying out to sea between said points.
Tax.	The fishing is conducted by private enterprises which pay to the Government an annual tax of 200 dol. (20L.) for each apparatus used, which usually consist of one boat and one machine, dress, hose, helmet, &c. Ordinary divers (that is those not using a dress) are not taxed.
Condition of oyster beds.	The condition of the oyster beds is said to be very good; they reproduce very quickly, and are free from disease of any kind.
Output.	The output of the fisheries is on an average 15 tons of shells per month, each ton producing about 150 dol. (15L.) worth of pearls.
Mode of fishing.	The fishing at Chiriqui Islands is carried on with diving apparatus of English manufacture, but at the Pearl Islands proper only ordinary diving is allowed. Pearls of considerable value are sometimes found in the fisheries.
Restrictions.	There is no limit to the time in Decree No. 6 of 1890, which prohibits the free search for pearls, and it will continue in force until repealed.
Oriental Pearling Company.	During the past six months, the "Oriental Pearling Company," of London, has had a vessel prospecting among the available pearl fisheries, especially seaward, and so far as can be ascertained the results have not been satisfactory.

Miscellaneous.

Population.	The population of the department of Panama is about 300,000.
Railways.	There are 78 kiloms. (about 47½ miles) of railways, and 100 kiloms. (about 62½ miles) of telegraphs.
Electric tramway.	An electric tramway was laid early in 1892, and continues to work satisfactorily.
System.	It is a modification of the overhead or trolley system, an iron cross-arm being substituted for the trolley. The track traverses the entire length of the city along the principal thoroughfares, and can convey something over 450 passengers per hour, the fare being 10 c. (2½d.) per trip. Cabs, or, as they are locally called, "busses," ply throughout the city, and their business does not seem to have been materially affected by the introduction of the tramway.
Fare.	

There is no regular water supply to the city, and in sharp contrast with the very modern electric cars may be seen, at all hours of the day, the lumbering 17th century water-carts, mule drawn, which constitute the only source of water supply, as has been the case since the foundation of the city 220 years ago. Water supply.
Water carts.

Efforts were made to obtain a proper supply of water by the construction of an aqueduct long before the necessity for a tramway was recognized, but for one reason and another proved abortive. An aqueduct.

The fish supply is abundant, and of excellent quality, and both fresh and dried fish constitute a considerable proportion of the diet of the poorer classes. Fish supply.

In Colon, however, between the high market charges and the contributions payable by the fishers, the fisheries are not so payable as they were in former years, when the large population created a great demand, and the business has fallen into the hands of comparatively a few parties who can barely supply the market, and which keeps the price high. Dried and corned fish is therefore an article of importation from Panama and even from Jamaica. Charges.

Much attention has been recently paid to the continuous spread of the loathsome disease, leprosy, in certain departments of the Republic, and the necessity that exists for proper scientific segregation of the victims. Leprosy.

It was supposed that Panama was also afflicted, and the establishment of a lazaretto on Coiba Island was suggested. Official enquiry developed the fact, however, that the disease has no hold on this department. Referring to a despatch from Governor Aycardi to the Central Government on the subject, I translate as follows:—"On account of the recent exploration of the Island of Coiba, by a scientific commission, which was made by order of the Government, inquiry has been made into the number of lepers that exist in this Department, resulting, according to the official report to hand, that only in this and in the province of Colon do any cases exist of elephantiasis, and that these only amount to twenty-three in number. In the other four provinces of the interior, which are Cocle, Chiriqui, Los Santos, and Veraguas, the disease is entirely unknown. Lazaretto suggested.

By Decree published at Bogota dated December 1st, 1893, all ships arriving at a Colombian port are required to present a Bill of Health visaed by the Colombian Consul at the port of departure, or in the absence of such, by the Consul of a friendly nation. Bills of health visaed by the Colombian consuls.

It is interesting to note that by a Municipal Decree of 1893 the city of Panama was placed under the protection of the Sacred Heart of Jesus, a unique ecclesiastical distinction enjoyed in common with the Republic of Ecuador, and no other country in the world. A motion to do the same thing for the Republic was introduced into Congress some time ago, but it was not carried. A notable decree.

Agriculture.

- Natural resources.** Although the conditions resulting from the cessation of work on the canal, directed the attention of the people on the Isthmus to the agricultural and other natural resources of the country, resulting in the clearing and cultivation of large areas of unoccupied lands, yet agricultural industries may be described as still in their infancy.
- Vegetables and fruits.** The majority of cultivators have confined their efforts to the production of vegetables for the local markets, and fruits, principally bananas, for exportation to New York. Others, however, possessed of some capital and more ambitious ideas have endeavoured to establish plantations of sugar-cane, coffee and cocoa.
- Coffee not very successful.** The experiment in coffee has not proved very successful, generally; the climatic conditions not being very favourable except in a few localities of a limited area, and where other necessary conditions are not satisfactory.
- Cocoa.** Of the cocoa cultivation little can as yet be said, but the conditions both of soil and climate are advantageous.
- Rubber.** The efforts to cultivate rubber trees also give good promise, which is important as the gathering of this gum gives indications of its ceasing to be a forest industry at no distant date, owing to the wholesale destruction of the trees—elsewhere referred to.
- Sugar-cane.** Sugar-cane has received most attention and given the best results, several important essays having been made in this direction. An extensive and now thriving plantation has been established by an American citizen, which produces an excellent quality of sugar-cane though not yet in sufficient quantity to affect the market. At Empire, twelve miles from Panama, there has been established a large hacienda for the cultivation of sugar-cane, coffee and cocoa. Heavy vacuum-pan sugar works and a large distillery have been erected, but up to the present time only rum has been produced.
- Textile plants not touched.** So far no effort has been made in the direction of cultivating textile plants, although perhaps no other industry offers better possibilities, as is indicated by the various fibres produced from wild growth by the crude native processes.
- An exhibition.** On the 25th of December a local Industrial Exhibition was held at Empire at which the exhibits of native produce and manufactures were surprisingly varied, and gave satisfactory promise for future developments of the country which only the lack of sufficient capital and good roads are likely to retard.
- Banana meal.** Particular attention has been directed to the exhibits of banana meal, experimentally produced without proper appliances, and which indicated the possibilities open to intelligent efforts in this direction.
- Interior developments.** In the interior provinces of the department there has also been a marked increase in industrial enterprise, more particularly in the matter of forestry.
- Woods.** The bulk of the trade at present is in woods, the greater part of which is transhipped at this port for the south, where it is re-

transhipped and carried through the Straits to Europe at cheaper freight rates than it would be drawn across the Isthmus by the railway. The German steamers also took a large share direct from Darien to home ports during the year. Magellan Straits.
Freight rates.

The forests of the Darien are immense and practically unexplored; but enough of them is known to indicate that they abound not only in precious woods, but also in medicinal plants, rubber, ivory-nuts, fibres, &c., to which, while but small attention is now paid, must render the provinces richly productive in the future. Other forest products.

The elevated plateaus and open savannah lands of the interior also offer remarkable inducements for the establishment of farms, and the raising of cattle, which are at present mostly imported to supply the local markets, with the result that, while the price of beef is not excessive, the quality is generally very poor. Farm lands.
Raising cattle.

Transit Trade.

According to the figures in annexes, A. to F., compiled from statistics furnished by the Panama Railroad, a general decrease in the transit business is observable, although there is a decided increase in the item of coffee and one or two others. Panama railroad.

In local trade, freight movement from Colon to Panama shows a decrease in 1893, as against 1892, of 14,183 tons, and from Panama to Colon of 1,776; the total decrease for the year being 15,959 tons. Local, decrease in.

The interoceanic transit also exhibits a decrease from Atlantic to Pacific ports of 3,321 tons, while from Pacific to Atlantic ports there was an increase to European ports of 7,987 tons, and a decrease to the United States of 4,554 tons during the year. Atlantic to Pacific.
Pacific to Atlantic.

It is seen that, according to annex D, the total amount of freight transported during the two years was 415,963 tons. There was an increase in principal articles including coffee, cocoa, and iodine, while all else showed a decrease, cotton especially having fallen from 20,165 bales in 1892, to 724 in 1893. Total amount.

The passenger trade continues on the decrease showing a falling off for the year of 7,428. Passengers.

For the purpose of facilitating the interoceanic traffic across the Isthmus, 240 feet have recently been added to the sum total of the length of the Panama Railroad Wharf, which increased it to 1,000 feet. Embarkation can now be effected with little difficulty at almost all states of the tides. Wharf accommodation.

Canal.

The future of the Interoceanic Canal enterprise continues to occupy public attention, and the interest becomes more acute as the time approaches when the "prorroga," under which the present concession is held, will expire if active operations be not resumed. The future.
The Prorroga."

before then, which will be at the end of October next. The mercantile community and the labouring classes alike, base strong hopes on the expected resumption of work, and should these not be realized, the probability is that the existing depression will be indefinitely prolonged.

Machinery.

In view of this expected resumption of work every effort has been made to maintain the plant in proper order, and the machinery is said to be in a very fair condition.

The construction works also appear to have suffered but trifling deterioration during the suspension, and should the enterprise be carried on the work may practically be taken up where it was left off.

Annex A.—COMPARATIVE Statement of Local Freight Carried across the Panama Railway from Colon to Panama and Line of Canal, and from Panama to Colon and Line of Canal, during the Years 1892-93.

Year.					From Colon to Panama and Stations.	From Panama to Colon and Stations.
					Tons.	Tons.
1892	..	..	..	..	26,839	3,687
1893	..	..	..	..	12,656	1,911
Decrease					14,183	1,776

Annex B.—COMPARATIVE Statement of Freight Carried over the Panama Railway from Atlantic to Pacific during the Years 1892-93.

Year.					From Europe to all Destinations.	From New York to all Destinations.
					Tons.	Tons.
1892	..	..	..	..	59,831	40,801
1893	..	..	..	..	59,532	37,779
Decrease ..					299	3,022

Annex C.—COMPARATIVE Statement of Freight Carried over the Panama Railway from Pacific to Atlantic during the Years 1892-93.

Year.					From all Destinations to Europe.	From all Destinations to New York.
					Tons.	Tons.
1892	..	..	..	..	48,628	36,119
1893	..	..	..	..	56,615	31,565
Increase ..					7,987	..
Decrease ..					..	4,554

Annex D.—COMPARATIVE Statement showing Amount of Freight Carried over the Panama Railway during the Years 1892-93.

Year.						Quantity.
						Tons.
1892..	..	..	..	..	..	215,905
1893..	..	..	..	..	..	200,058
Decrease ..						15,847

Annex E.—COMPARATIVE Statement showing Principal Articles of the Pacific Coast Transported over the Panama Railway during the Years 1892-93.

Articles.				Quantity.		Increase.	Decrease.
				1892.	1893.		
Coffee	..	..	Bags	524,547	554,441	29,894	..
Cocoa	..	..	..	138,629	177,268	38,643	..
Indigo	..	..	Zeroons	10,111	6,887	..	3,224
Ivory nuts	..	..	Bags	54,350	48,607	..	5,743
Cotton	..	..	Bales	20,165	724	..	19,441
Rubber	..	..	..	12,559	9,773	..	2,786
Tobacco	..	..	..	2,736	1,281	..	1,455
Hides	..	..	Loose	147,314	108,000	..	39,314
Iodine	..	..	Barrels	1,731	3,631	1,900	..
Mahogany	..	..	Tons	1,526	1,205	..	321

Annex F.—COMPARATIVE Statement showing Total Number of
Passengers Carried over the Panama Railway during the
Years 1892-93.

Year.						Number of Passengers.
1892..	..	..	..	..	..	49,446
1893..	..	..	..	..	..	42,018
Decrease, 1893						7,428

Annex G.—RETURN of all Shipping at the Port of Panama during
the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	3	3,780	75	62,769	78	66,549
American	...	...	81	129,239	81	129,239
Chilian	...	...	26	38,741	26	38,741
German	...	...	6	7,270	6	7,270
Colombian	17	820	...	...	17	820
Total	20	4,608	188	238,019	208	242,619

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	3	3,780	76	63,837	79	67,617
American	...	...	82	130,269	82	130,269
Chilian	...	...	26	38,741	26	38,741
German	...	...	6	7,270	6	7,270
Colombian	19	1,055	...	...	19	1,055
Total	22	4,835	190	240,117	212	244,952

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1894.
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COREA.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF COREA.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1227.

*Presented to both Houses of Parliament by Command of Her Majesty,
JUNE, 1894.*

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COREA.

SÖUL.

Acting Consul-General Wilkinson to the Earl of Rosebery.

My Lord, *Söul, March 1, 1894.*
I HAVE the honour to forward herewith my Report on the
Trade of Corea for the year 1893.

I have, &c.
(Signed) W. H. WILKINSON.

Report on the Trade of Corea for the Year 1893.

ABSTRACT of Contents.

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Total trade.

The trade of Corea employs as its medium of exchange the yen or silver dollar of Japan, and the copper cash of the country. In comparing one year with another, therefore, it would appear more natural to follow the method adopted by the Royal Corean Customs, and express the process in dollars rather than in sterling. Put thus, it will be found that at each of the three open ports, and, with a single exception, in every one of the main departments of trade, the returns of 1893 fall below those of 1892. The figures are as follows:—

	Value.	
	1893.	1892.
	Dollars.	Dollars.
CHEMULPO.		
Foreign imports	2,045,607	2,628,430
Native "	1,167,529	1,190,631
Exports	768,749	1,144,688
Total	3,976,885	4,963,744
FUSAN.		
Foreign imports	804,884	1,037,035
Native "	310,963	351,095
Exports	1,207,894	1,738,323
Total	2,323,741	3,126,453
WŬNSAN.		
Foreign imports	650,269	564,667
Native "	301,737	438,974
Exports	525,373	575,562
Total	1,477,429	1,579,208

The total net trade of the three ports for the past 3 years has been:—

Year.	Value.
	Dollars.
1893.	7,778,055
1892.	9,669,400
1891.	10,249,209

When converting the amounts for 1891-92 into sterling the dollar was taken at 3s. 4d. and 3s. respectively. During 1893 it fell steadily from 3s. to 2s., and the mean between these sums,

2s. 6d., may be assumed as a fair average rate for the year. Estimated in this way it appears that the total foreign trade of Korea for 1893 amounted only to 972,507*l.* as against 1,450,410*l.* in 1892, and 1,708,202*l.* in 1891.

Whether it is altogether fair to so estimate it, is open to question. It is no longer possible to sum up the trade of the Peninsula, with epigrammatic conciseness, as "Japanese barter of British cottons for Korean grain"; but as, despite a deplorable falling-off, the bulk of the import trade is still in British goods, gold values cannot be entirely ignored. In any case the diminution is apparent enough even when the details are left in unconverted yen.

When we come to consider the causes of the diminution, we find them ascribed partly to the unsettled political condition of the country in April, but chiefly to the great damage done to the crops by the heavy storms of September. Before, however, either of these causes could operate, when the trade for the year opened, it was evident that the reaction from the "boom" of 1890-91 was still in swing; the markets were congested and dull. As for the political condition of Korea it has not during many years been favourable to trade, if indeed it ever was. The phase by which the commerce of 1893 was chiefly affected is still somewhat of a mystery. In March last the foreign residents of Sŏul began to hear rumours of a rising in the southern provinces which was in some way supposed to be directed against them, and more particularly against the Japanese. The insurgents styled their movement the Tong-hak, "eastern culture," and were represented as reactionary in their professions and bloodthirsty in their intentions. On April 13 the Japanese Consul at Sŏul issued a notification calling on his countrymen to keep their women and children in readiness for removal to Chemulpo at a moment's notice. By April 25, however, the excitement had subsided and confidence was restored. In May the reports revived, simultaneously with a rise in the price of rice. That, indeed, the disturbance was connected rather with fear of scarcity than with any sentimental objection to Japanese traders or American missionaries, seems probable. Originally the Tong-hak was a quasi-religious society, its founder a reformer such as the Bab of Persia, and like him a martyr. Now it would appear to be a convenient organisation for resenting too rapacious extortion. However that may be, its operations adversely affected trade, which still remains very largely in the hands of the Japanese.

Moreover, at the time when the Tong-hak were most in evidence, from March to May, 1893, relations between Japan and Korea were somewhat strained. Under a clause which appears as Art. 5, Sec. 6, of the British Treaty, and has its counterpart in the treaties with other States, the Korean Government is empowered to prohibit the export of grain on giving a month's notice. In 1888 the Government informed the Japanese Minister at Sŏul that the export of grain would be prohibited from Wŏnsan. Notice was at the same time given to the Japanese Consul at that port by the

Causes of
diminution.
Political :
The Tong-
hak.

Rice
prohibition of
1888 ;
Japanese
reclamations
in 1893.

local authorities, but instead of allowing a full month to elapse the prohibition was enforced at the end of 28 days. In the meanwhile, at the instance of the Japanese Minister, it had been rescinded, and the embargo was shortly afterwards removed by the local authorities at Wönsan. The governor of the province, however, in which Wönsan is situated, ignored the orders of the Foreign Office, and continued to forbid the removal of grain for export during a space of some 2 months. After a lapse of more than 2 years a claim for damages on an extensive scale was advanced by the Japanese merchants, and was asserted with some emphasis by the Japanese Minister in the spring of 1893. Finally but not until the uncertainty of the issue had seriously embarrassed trade, the original claim for some 170,000 dol. was settled for a present payment of 60,000 dol. and a promise of 37,000 dol.

Rice
prohibition
of 1893.

In explanation of the Japanese demand it should be observed that it has become a common practice for Japanese merchants to advance to the Korean farmers money on the growing crops. The merchants themselves are not, for the most part, men of capital, and have in their turn to borrow at heavy rates from the Japanese banks. If the crop is a good one, and at the same time the selling price of rice in Japan is high, the speculator makes a handsome profit; but if he is for any reason hindered or delayed in realising his outlay his losses may be serious. A very lively interest, therefore, is taken in the harvest prospects of each year. In 1893 these at first appeared to be excellent, but early in September furious gales damaged the rice crops in all parts of the Peninsula, and more particularly in the neighbourhood of Fusan. The harvest of 1892, moreover, had been below the average, and supplies from that year fell off earlier than would otherwise have been the case. Moved, as was stated, by these considerations, the Korean Government resolved to again avail itself of the right to forbid the export of grain. On October 18 notice was given to the foreign representatives at Söul that the embargo would be enforced at all three open ports at the end of 1 month. Care was taken in this instance to avoid the inconveniences of reclamation. The points considered were, first, whether notice to a representative at Söul was sufficient notice to all his nationals, and, secondly, whether "a month" was a month of the European and Japanese calender, or a moon of the Chinese-Korean. The words of the British Treaty run "shall become binding on the expiration of 1 month from the date on which it shall have been officially communicated by the Korean authorities to the British Consul at the port concerned." Her Majesty's Consul-General holds a commission for the whole of Corea, and for ordinary purposes may be considered as being, in Corea, omnipresent. The Vice-Consul, who is also Vice-Consul for Corea at large, resides however at Chemulpo; but at Fusan and Wönsan British consular officers have not yet been stationed. At all three open ports, on the other hand, are placed Japanese Consuls. If then, Japanese subjects could continue to export grain until formal notice was given to each local Consul it might happen that a

British subject or vessel would be placed at a disadvantage. The difficulty, which in the absence of British shipping and British merchants is as yet academic, was met in this instance by arranging through the Commissioners of Customs at Fusan and Wönsan for the due dating of the notifications. With regard to the period of notice it was admitted that as the English text was by Art. 12 to determine interpretation, a month meant a calendar month and not a moon. A third question, as to whether "grain" includes pulse, was left unsettled, as the Korean Government decided to restrict the embargo to rice. After some discussion the Government made a further concession and permitted the open time to be extended, at Fusan and Wönsan to December 1, and at Chemulpo to December 6.

The embargo, once enforced, operated, particularly at Chemulpo and Fusan, to very seriously check trade. This was the case not at the ports alone, but also in the interior, where some of the more rapacious officials took upon themselves to hamper the export of articles which only to a very vivid imagination could appear as foodstuffs, such as nutgalls and cowhides.

In addition to the more serious reasons for depression, there existed at the various ports hindrances to trade, some of which were successfully overcome. At Chemulpo, for example, the local authorities endeavoured to compel all Korean coasting vessels to discharge at Man-sek-tong, a village upwards of a mile from the custom-house, instead of at Chemulpo itself. As the beans and other produce with which these craft are laden are nearly all borne on Japanese account, and are ultimately exported to Japan, the innovation, which added considerably to the cost of carriage, was resisted by the Japanese and was finally withdrawn. Another proceeding which for a time caused trade to be suspended was the renewed attempt of the Korean officials to restrict the number of brokers through whom the Japanese and other foreign traders transact their business. This, though successful for a time, was ultimately put down. Local causes
of bad trade.

Fusan suffered from a similar project. The course of trade there—where the foreign traders are practically all Japanese—has been for the charterer of a craft bringing produce from an unopened port for sale, to either go direct to the wharf of the purchaser or to negotiate the sale through a native broker. The charges of the latter varied with the nature of the goods sold, from 100 cash per picul of seaweed to 300 cash for a like weight of bêche-de-mer. On an average, the brokerage for each boat would come to some 40 dol. These charges have increased, it is stated, by over 30 per cent. since the appointment by the Government at Söul three years ago of two official head-brokers, one to reside at Quelpart and one at Fusan. To these head-brokers, whether they take part in the sale or not, three-fifths of the brokerage has to be made over. Not content with imposing these burdens on trade, the authorities of the capital in July last either started or sanctioned an agency variously known as the "Association for Protection and Examination," or the "Insurance Korean
brokers at
Fusan.

Association." The avowed objects of the corporation, as made known at Fusan itself, were three: to provide a boat harbour, by building a breakwater or otherwise; to erect go-downs for the safe storage of cargo; and to appoint a committee for the appraising of goods brought into the port for sale. The ostensible reason for the last item was to prevent the higgling so constantly indulged in between the Korean vendor and the Japanese purchaser. It would appear, however, more than a little sanguine to expect that a purchaser of any nationality, and still less a Japanese, would be content to take the certificate of such an association as proof of weight and quality. Apart from this drawback, there is nothing on the face of the programme that is objectionable. Unfortunately, the plausible exterior conceals, there is reason to fear, a further menace to trade. To pass over the exaction of fees that seem at present not very high, the regulations of the association require all native boats to enter and clear through its agency, and to transact business through its officers; they even contemplate the daily fixing of prices. Further, all boats leaving Fusan for coast ports are called on (and will be compelled, if the association takes firm hold) to provide themselves with a certificate from the agency setting forth the amount and nature of the cargo. Thus the association would seem to combine the functions of a harbour trust and semi-official brokers' guild with those of a native custom-house.

Inland
exactions.

The exaction in violation of treaty of inland dues over and above the tariff is a practice as well known (both to foreigners and to the native Government) as it is difficult to suppress, and this too, it is needless to say, serves to check the development of trade. From a list of these charges which has been shown to me I find that the average impost on cotton cloth at each of eight stations in three provinces served from Chemulpo is 300 cash per piece. These charges, and the absence of roads and navigable rivers, prevent foreign goods from penetrating far inland.

Depreciation
of copper
cash.

The effects on the import trade of the depreciation of silver in relation to gold need not be here discussed, but some mention should be made of the cognate question of the appreciation of silver when compared with the native cash. Not so long ago a dollar exchanged for 700 to 800 cash; now it is worth 3,000 to 3,300 cash. This greatly handicaps trade in foreign goods, for the consumer estimates his income and expenditure in cash, and where the cash price of a foreign article is, in his opinion, unduly increased, he foregoes it and returns to its native equivalent.

Shipping.

The total tonnage for 1893 was less than that for 1892 by some 3,960 tons, or about 1 per cent.

British.

No British vessel made her appearance off this coast during the year. When Corea was first opened to our trade, in 1883, a British steamer ran at regular intervals between Chemulpo and

Shanghai, under an agreement with the Korean Government. Just when the Koreans were beginning to appreciate the advantages of safe, rapid, and regular transit the steamer was withdrawn.

This left the way clear for the Japanese, who after some experiments established a regular mail service under that title, the "Nippon Yusen Kaisha." This proving a success, a rival company, the "Osaka Shosen Kaisha" was started, at first between Kobe and Fusan, but last year also to Chemulpo. The resulting competition lowered freights, and dealt a heavy blow to the Japanese junk trade, which fell at Chemulpo from 232 entries in 1892 to 138 entries in 1893, and at Fusan from 472 entries to 394 entries. Wönsan being outside the competition was not affected. Despite the accession of the new company it will be observed that the number of Japanese steamers entered at Chemulpo was 33 below that of 1892, a fall of 25 per cent. This must be attributed to the rice embargo.

The decrease in Russian steamers (there have not been as yet any Russian sailing vessels) was due to the discontinuance of the small Fusan-Wönsan grain vessel. The 30 entries represent the "round trips" of the Shanghai-Vladivostock boat.

The Chinese loss is practically only in sailing vessels. The German 8 entries are those of the "Chaochow foo," a steamer sold to the 'I-wun Sa, a Korean Company under official direction. The single American steamer was a little vessel fitted out at Nagasaki for whaling purposes. She met with no success.

The chief feature of the year is the great increase in vessels, both under steam and sail, carrying the Korean flag. In 1886, the first year in which that flag appears in the returns, the numbers were: steamers 7, sailing vessels 3. In 1891 the respective figures were 23 and 28; in 1892 they were 33 and 65, representing a total tonnage of 8,780. Last year they advanced to 141 steamers and 149 sailing vessels, with a total tonnage of 41,466, a gain of nearly 500 per cent. The increase of sailing vessels was at Chemulpo only, but that in steamers at all three ports. Korea possesses no appliances for building vessels of foreign type, so that the increase is all due to purchases from abroad. At Chemulpo most of these have been made on account of the 'I-wun Sa already alluded to, a company formed at the close of 1892 to take over the Korean Government vessels controlled by the "Transport Office." Until the past year these were engaged mainly in the conveyance of troops or of Government rice; they now carry passengers and cargo. At Fusan, in June last, the Korean Steamship Company which employs tugs and lighters for the traffic between that port and the Naktong River, obtained from Japan a small wooden steamer to run to points further along the coast. The deplorable system of local taxation caused the venture to prove a failure, and the vessel returned in December to Japan. At Wönsan a similar attempt was made to develop the coasting trade. In March a steamer of 122 tons was specially licensed to ply to ports north of Wönsan, and in June she was

joined by a steam launch of 24 tons. Both did well, but for some reason the licences were suddenly withdrawn in September. The larger vessel has returned to Japan, but the smaller, having procured a new licence, resumed running in October.

Coast trade.

The figures representing the coast trade for 1893 were :—

					Value.	
					Imports from Coast Port to—	Exports to Coast Port from—
					Dollars.	Dollars.
Chemulpo	..	..	..	..	1,002,294	385,659
Fusan	..	..	..	..	75,793	36,973
Wonsan	..	..	..	..	80,254	114,753
Total	..	..	..	..	1,158,341	537,385

or a total trade of 211,966*l*.

No movement deserves greater encouragement on the part of the Korean Government than this. Corea possesses for her area a very extensive coast line, but she has few navigable rivers, no canals, and scarcely a track that deserves to be called a high road.

Séul river
launches.

Of her rivers the most important one by far is the Han ("the river," par excellence), the waterway to Séul. Previous reports have dwelt on the importance of placing suitable steam vessels on this line. During 1893 a Chinese Company, the T'ung-hui Kung-ssü or "Mutual Transport Company," was formed, and caused to be built at Shanghai a launch of 107 tons, by far the largest and most commodious vessel in the trade. Her first trip to 'Yongsan was a success, but her subsequent journeys were disastrous, and at the close of the year she was sold to the 'I-wun Sa for the coasting trade. She was, it appears, at once too long and too deep for the river. In her place the company are contemplating the purchase in Japan of two smaller steamers.

Meanwhile, during the open season, an almost daily service is kept up between Chemulpo and 'Yongsan (or the neighbouring village of Mapu) by means of launches of Japanese or American ownership. These last fly the Korean flag, on the ground, it is understood, that Mapu-'Yongsan is not an open port. This, however, would appear to be entirely erroneous, as by the British Treaty the place may certainly be claimed as open, being "in the neighbourhood of Yanghwachin."

Exports.

The principal exports of Corea are rice, pulse, fish, hides, skins, native cottons, seaweed, shark's fins, bêche-de-mer, bones, paper, wheat, barley, and nutgalls.

There was a very great falling-off in the export of rice from **Rice.** all three ports, the total being 203,369 piculs, against 630,580 piculs in 1892, a decrease of 26,000 tons. The cause of this has been already explained. Corean rice, it may be observed, will probably always be in demand in Japan, not only to meet the actual requirements of that country, but also to supply the place of the rice exported thence to Europe and America.

Beans and peas showed a serious decrease at the two principal **Beans and** ports, Chemulpo and Fusan, but a large increase at Wönsan. **peas.** The total diminution for the whole country was 10,408 tons. The destination of almost all the pulse that leaves Corea is Japan, where the beans are used in the preparation of soy and of a local condiment known as miso. As is also the case with rice, a certain proportion of the Corean beans finds its way from Japan to other countries. The decrease in the export for 1893 was due to a diminished harvest owing to the storms in autumn.

Fish, which appears in the returns both as fresh fish and as **Fish.** fish manure, shows a satisfactory increase at every port, being some 20,000 tons in excess of 1892. The fishing ports are those of the east coast, Fusan and Wönsan, the export at Chemulpo being insignificant. One great fishery is that of sardines, which, however, instead of being prepared as a breakfast esculent, are disposed of to the Japanese in the less dainty form of manure. The catch of this fish appears to be greater each alternate year. At Wönsan in 1893 it was treble the take of 1892. There can be no doubt that in her fisheries should lie a great source of wealth for Corea, but so far the profits have gone to the Japanese. The Coreans are averse to the hardships of a fisherman's life, and when they do exert themselves sufficiently to make a haul cannot take the trouble to properly prepare the fish for the market. At the same time it would seem as though the Fisheries Convention between the two countries is in some respects unduly favourable to the Japanese. The tariff of charges, says Mr. Hunt, Commissioner of Customs at Fusan, is too light, and the penalties are inadequate. "For the benefit of Corea the regulations should contain a clause stipulating that all fish caught on the coast must either be sold in Corea, or, if intended for abroad, brought to an open port, and there pay the prescribed duty." Lest too much pity should be expended on the exiles of Wönsan it may be added, from Mr. Oiesen's report, that "a large salmon is sold for about 10 c. (3*d.*)," and that "oysters of excellent quality form a staple article of food in winter."

The export of cowhides diminished at Chemulpo and Wönsan, **Hides.** but increased at Fusan. On the whole there was a falling-off of about 5 per cent. The gruesome feature in this commodity is that its export always varies directly with the prevalence of cattle plague. The greater the amount of rinderpest the more hides for sale. Most of the skins go to Japan, there to be made into foot-gear, but some find their way to Newchwang as coverings to the stove beds, the Chinaman, with national nonchalance, taking his risk of anthrax. Under ordinary circumstances the killing of

beef for food in this country is limited, not because the Korean has a distaste for beef (the contrary is the case), but because the Confucian precept that forbids the slaughter of the ploughing beast gives here an excellent excuse for an official squeeze. The number of cattle that may be killed each day varies with the locality: at Wönsan, for example, it is one; at Pingyang, 30. A village community, except during times of murrain, can only taste beef by special permit from the authorities. Hence the supply of raw hides is, from the nature of things, restricted. Even when the cow is dead there are difficulties in the way of free trade in her hide. At Chemulpo, for example, the business is "in the hands of guilds or companies who for certain sums to Government are granted a monopoly, and any hides sold otherwise than through those guilds are liable to confiscation, and the vendor to punishment." This, as Mr. Osborne, from whom I quote, observes, "tends to raise the price above the poor quality." The quality is poor because, in the first instance, the beasts are mostly beasts of burden, and the friction of the pack saddle has raised in what should be the best part of the skin "detrimental callosities." In the second place, "Coreans are clumsy and careless in skinning the dead animals, frequently cutting and disfiguring the hides in the process, and the drying is done in a very perfunctory manner." "Perfunctory" is, perhaps, too euphemistic. The popular method at Chemulpo is to spread the skin, still unpleasantly gory, on the high-road, and trust to the dogs and the feet of the passers by to do the drying.

Skins.

More presentable forms of peltry are those entered in the returns under the heading of skins. These include, among others, those of bear, dog, leopard, tiger, fox, and badger. The chief ports for skins are Chemulpo and Wönsan, the former for badgers, the latter for dogs. The total number of pelts exported in 1893 was about the same as in 1892, a large decrease in dog-skins being balanced by an increase in badgers. The number of tiger-skins that leave the country each year never appears to exceed two or three dozen. To judge by the Wönsan returns, their average price has nearly doubled during the past year, having risen from 22 dol. or 23 dol. to 44 dol. (4 guineas). Leopards' skins, which form part of the official insignia in Corea, remain at about the former price, 10 dol. Only some 40 of them were exported in 1893. In this connection I may quote a passage from Mr. Commissioner Oiesen's picturesque decennial report on Wönsan. After speaking with enthusiasm of the wild animals and scenery of his district, he adds, "Surely it is a reproach alike to the ambitious globe-trotter yearning for unbeaten tracks, to the ardent sportsman in search of big game, and to the sedate aspirant to the honours of the Geographical Society, that within such easy reach there should still be a terra incognita possessing so high a reputation."

Native cotton.

One of the noticeable circumstances in the trade of 1893 was the large increase in the export of native cotton from Fusan. Under this head is included both raw cotton and cotton goods of native manufacture. The greater part of the former goes to Japan,

whence it often returns to Corea in the form of wadding for clothes. The latter in 1893 went almost entirely to Wönsan, where they competed successfully with their Manchester rivals. Several circumstances seem to have aided in promoting this trade. In the cotton districts of South Corea the checks, natural and artificial, on the rice traffic at once obliged the farmer to take to other employment, and afforded him the leisure to do so. Meanwhile, in the consuming area, North and North-East Corea, the fall in silver forced up the apparent price of foreign cottons, while it left unaffected that of the native. Corean cotton cloth is much coarser in texture than its foreign rival, but is considered more durable; it is hardly necessary to add that it is all woven by hand.

In seaweed there has been a falling-off at every port. Fusan Seaweed. is the chief port of shipment for this article, as Osaka of consumption. The decrease was due to the liberal admixture of sand by the Corean vendors, a practice the Osaka and Fusan Chambers of Commerce are now endeavouring to check by requiring all parcels to be publicly examined before shipment. The export of *bêche-de-mer* has been stimulated through the employment by the enterprising Japanese of diving gear in foreign fashion.

The plant "takpool," mentioned in Mr. Fox's note to Mr. Paper. Hillier's report for 1892, has been identified at the Kew Gardens as *Hibiscus Manihot*, and is, it would appear, the same as that used in Japan for sizing the paper made from the bark of the *Broussonetia papyrifera*, or paper mulberry. The export of paper for 1893 shows a slight increase over that for 1892.

Attention has been drawn in more than one previous report to Sundries. the possibility of an export trade in human hair. All female attendants in the palace wear on their heads a heavy mass of false hair. This, I am informed, is of at least two qualities, according as it is derived from the clippings or from the combings of the head. The Corean youth, whose hair hangs down below his waist, finds it necessary from time to time to have his locks thinned out. The resulting hairs are preserved and twisted into tresses. A tress thus formed, of the thickness of a finger and the length of a yard, sells at from 4,000 cash to 5,000 cash (about 3s.); a similar tress made up from combings is worth about half that amount. The greatest quantity of hair comes from the southern provinces, but the best from Hwang-hai Do. There, it is explained, the extent of the rice fields keeps the atmosphere moist and clear of dust, so that the hair of its inhabitants is at once luxuriant and comparatively free from foreign matter. The only feature to which the fastidious *gesang* takes exception is its colour, which is too fair for her taste. That, however, is overcome by the accommodating perruquier, who dyes it to the fashionable shade of black.

Imports.

Speaking generally, there was a heavy fall in foreign cotton Cotton goods.

goods at Chemulpo and Fusan, while at Wönsan they remained stationary. The only item which at Chemulpo showed improvement was Chinese nankeens, which rose from 25,648 pieces in 1892 to 31,240 pieces in 1893. If the sole cause of the decline in cottons had been the fall in silver, the Chinese gain should have been accompanied by a corresponding increase in Japanese cloth. The contrary is, however, the case. Except at Wönsan, where the improvement is but slight, Japanese cottons were very considerably below the figures of 1892. In his special report on Fusan (Miscellaneous Series No. 318), Mr. Hillier stated that the Japanese "have carefully studied the wants of the people, and are introducing a fabric of coarse and strong texture, which is specially popular amongst the women. Last year these goods represented one-fourth of the total import of foreign shirtings." This year, however, Japanese cottons at Fusan stand at less than one-seventh of the whole, and the coarse cloth to which Mr. Hillier refers has passed completely out of vogue. The reason for its doing so is significant, and shows why Japanese trade in the peninsula may continue to decline, in spite of Japanese energy. As soon as other Japanese manufacturers found that the cloth in question was making way, they produced and placed on the market an inferior imitation of it, and thereby brought it into discredit. This is not, I am given to understand, an isolated instance of a very suicidal practice.

Notwithstanding the serious falling-off in the last 2 years, foreign cottons (of which nine-tenths are British), still represent upwards of 45 per cent. of the total imports. With better harvests, the import should easily recover—indeed, over-pass the figures of 1890–91, did not the question of exchange stand in the way.

Woollens.

The improvement of some 3,500 dol. (438%) at Chemulpo was exactly balanced by the drop at Fusan. Wönsan, as in the case of cottons, remained stationary. The whole import of woollens into Corea is, however, trifling, being, for 1893, only 3,853%. Although the winters in Corea are long and severe, Coreans have accustomed themselves through centuries to meet them by means of wadded garments and flues. Three-quarters of such woollens as are taken appear under the heading of lastings.

Metals.

The total import of metals (217,183 dol. = 27,145%) was only one-third of that for 1892. This last, however, had been unduly swollen by the importation of metals for the mint at Chemulpo, a mint that was scarcely worked at all in 1893.

Sundries.

The total value of goods classed as sundries was some 7,000 dol. in advance of 1892, being 1,672,902 dol., as against 1,665,979 dol.; though, when these figures are expressed in sterling, the advantage appears to be with the earlier year. The articles that gained were raw cotton, fruit, medicines, needles, kerosene oil, Japanese paper, salt, and skins. There was a loss in arms, clothing, coal, dyes, fish, grass-cloth, matches, porcelain, provisions, building materials, and umbrellas; other articles such as saké, sugar, and tobacco remaining stationary.

Kerosene oil.

In Corea, as in China, kerosene oil is becoming a staple. In

1893, 936,000 gallons were imported, of which 63,350 gallons were Russian, the rest being American. The corresponding figures for 1892 were 730,543 gallons of American and 4,000 gallons Russian. The extraordinary advance in Batoum oils took place at Chemulpo and Fusan only ; at Wonun (where, however, the quantity is small) but half the import of 1892 was recorded. The improvement is due, it would appear, to the introduction of oil tanks into Japan—whereby the oil can be laid down more cheaply—and to more careful packing. For a mountainous country like Corea, too much attention cannot be paid to the doing-up of all goods, and not kerosene alone, in secure, and, at the same time, portable packages.

Salt advanced enormously at Fusan, where its superior quality Salt. and cheapness have practically driven the coarse and evil-looking native article out of the field. This would doubtless be the case in China were the embargo removed.

Matches improved at Chemulpo and Wönsan, but fell off, Matches. though the import still remained large, at Fusan. Nearly all the matches now brought into Corea are of Japanese manufacture, their cheapness rather than their quality preferring them to their Scandinavian rivals.

The decline in timber and building materials, to a certain Timber. extent, implies, as was in fact the case, a check in Japanese immigration ; but a great part of the high Chemulpo import of 1892 was for the mint buildings completed in that year.

Chinese silk piece-goods remained stationary at Chemulpo and Chinese silk Wönsan but retrograded at Fusan. They are perhaps the oldest goods. article of foreign luxury introduced into Corea, and, apart from the quantity consumed in the palace, which is practically fixed, the import of them varies with the wealth of the higher classes, who, in their turn, depend on fair harvests and a trade that will repay them the cost of the tax stations they farm from the Court. The native silks are of very narrow breadth, some 12 or 13 inches.

It would be wrong, however, to conclude from this that the Multiple Corean, like the Chinaman, prefers his piece-goods, whether of silk inner or cotton, narrow rather than broad. The Corean style of dress differs largely from the modern Chinese, and there is not in its case selvedge, Manchester systems. the same interrelation of cut and cloth. In my report on the trade of Swatow for 1892, to which I may be permitted to refer, I had stated that "to waste material is exceedingly distasteful to a Chinaman, and the size of his native piece-goods and the fashion of his clothes work together to avoid such waste." I suggested that it might be possible so to weave the cloth as to leave it subsequently divisible down the middle. Since the publication of that report I have learnt from one Manchester firm that cloth of the description I had sketched has been for some time in the market under the name of "splits." The cloth "is woven with two selvedges in the centre, and, although these cannot be made as firm as the ordinary selvedge, yet for practical purposes they are almost as good." The class of textiles thus treated has hitherto been, for the South American market, muslins and light fancy goods, and

for India, prints. A far more radical improvement in the same direction is promised, according to another correspondent. A machine has, it is claimed, been invented, "the object of which is to enable manufacturers of textile fabrics to weave any number of pieces of cloth, of any and varying widths, up to the full capacity of the loom, at the same time each width to have a fast and perfect selvedge (not juped) from the same warp and the same weft." Thus, on a 112-inch loom, with four of the 'multiple inner selvedge' machines at work, five pieces of cloth measuring, for example, 16, 32, 22, 20, and 22 inches respectively, could be simultaneously produced. The important bearing of such an invention—if equal to its claims—on the piece-goods trade of Eastern Asia must be my apology for this digression.

Corean system
of washing.

I may observe, as a curious fact, that the outer garments of Corean men (for which our Manchester goods are chiefly in request) are always taken to pieces before being submitted to the scrubbing and pounding that occupies half the day time (and sometimes one-third of the nights) of their wives and daughters. The consequence of this practice is that these robes are either only loosely stitched up with coarse thread, or, more curious still, are actually pasted together with starch. Were there more wealth in Corea, or more enterprise, it would seem that in this fondness of the male Corean for glossy white clothes should lie an opening for the introduction of the mangle.

Corean
headgear.

Other articles of common Corean wear might, were these difficulties and the nightmare of exchange once laid, be subjects of profitable import. The most characteristic portion of a Corean's dress is his head gear. This consists of (1), a band or fillet of woven horsehair pressing tight round the temples; (2), a cap, shaped like the old Phrygian, of the same material, horsehair; (3), the hat, of horsehair and finely split bamboo, in appearance like a tenuous parody of a Welshwoman's; (4), the strings of Chinese gauze. The first three are all of native make, woven by hand, and are by Corean standards very costly. The band varies from 50 c. to 4 dol.; the cap from 2 dol. to 30 dol.; the hat from 1 dol. to 12 dol. It might be possible to turn out all, or some, of these articles by machinery at considerably lower rates.

His shoes, again, are a source of vexation to a Corean of frugal tendencies. They are of native leather, cost, I am told, about 1 dol. a pair, and wear out in a month.

General Remarks.

Austro-
Hungarian
Treaty.

A treaty between Austro-Hungary and Corea was signed at Tokio on June 23, 1892, and the ratifications exchanged at Söul on October 5, 1893. It was drawn up in English and Chinese, and practically conforms to the English treaty, except that the tariff rates embodied in the French treaty of 1886 have been adopted, as more favourable. Additional advantages—which, under the favoured-nation clause all other treaty Powers will share

—are the reduction of duty on meerschaum from 10 per cent. to $7\frac{1}{2}$ per cent. ad valorem, and on arms and ammunition from 20 per cent. to 10 per cent. They are, however, of little practical value, as arms for Government use will naturally be free of duty. A special clause deals with opium, which, while remaining contraband, is restricted as regards importation for medical purposes to 3 catties for each Austrian ship.

In spite of the agreements and treaties excluding opium from ^{Opium} this country, considerable quantities are smuggled in each year, and at Chemulpo at any rate many Corean's are learning to smoke it. At the same time it is worthy of note (as bearing upon certain often exploded allegations connected with the Indian drug) that the smugglers have hitherto been, almost without exception, Chinese, and the opium smuggled is all grown in China.

Since the tragic failure of the Corean State Post Office in ^{Corean post office.} December, 1884, no attempt has been made on the part of this Government to convey private correspondence. The Foreign Customs establishment has, however, for some time past run a courier service between Chemulpo and Söul, and between Söul and Wönsan. On September 26 last a decree appeared in the "Corean Gazette," which, with regal brevity, announced that "telegraphs have been long established; a postal department should be also inaugurated. Let the two be amalgamated, and the General Telegraph Bureau become the general office for posts and telegraphs." Cho Pyong-chik, a former President of the Foreign Office (to which post he has now, January, 1894, been restored), was appointed Controller General; I Yung-chik, a Vice-President of the Foreign Office, was given charge of the inland delivery; and Mr. Greathouse, an American gentleman holding similar rank, was made associate in charge of foreign mails. No further steps have been so far taken, but it is understood that a series of postage stamps will be shortly issued.

In consequence of the increasing number of Coreans at ^{Corean} Shanghai, a Corean officer with the title of "ts'al-li," and duties ^{Consular Officer,} approximately consular, was appointed in September to reside at ^{Shanghai.} that port, but has not yet taken up his appointment.

The number of British subjects at the three ports (exclusive of ^{Foreign} Söul) remains the same; that of the Chinese has increased from ^{population.} 856 to 920, while the Japanese have decreased from 8,398 to 8,048. A better class both of Chinese and Japanese is coming to the country, but of the two peoples the Chinese, at any rate at Söul and Wönsan, appear to be making the greater progress. The Japanese, however, continue in point of numbers and in ship's tonnage to be far ahead, and to display the same activity and intelligence. As dealers in a thousand and one articles—chiefly cheap imitations of European goods—that make up the "sundries" list they are highly successful. Heavier transactions—all or nearly all with the Court—fall, as heretofore, mainly to the German and American firms established at Chemulpo, though the Japanese have sold during the past year a number of vessels, steam and sail, to the Coreans.

Electric light
in palace.

Among the larger contracts of 1893 was one for the lighting of the palace by electricity. This was secured by an able young American engineer, and the various machines, boilers, dynamos, engines, and the rest were constructed in the United States at a cost of some 60,000 dollars. This sum was paid, it may be mentioned, by the Corean Government in gold dust and nuggets, and it is said that two of the larger of the nuggets showed so little sign of attrition as to make it evident that the place of their discovery could not have been far from the matrix. They had formed, doubtless, part of the considerable sum remitted every year from the mines in the districts above Wönsan to the capital as royalties or taxes.

Other
occurrences.

The only other occurrences in 1893 that call for particular mention are the loss of the Russian corvette "Vitiaz" on an unknown submerged rock in an unfrequented channel leading to Port Lazareff, May 10; and the establishment of a naval school on the island-fortress of Kanghoa, at the mouth of the Söul River.

In conclusion I must express my indebtedness to Mr. McLeavy Brown, Chief Commissioner of Customs in Corea, and to the commissioners at the three ports, Messrs. Osborne, Hunt, and Oiesen, for valuable information and kindly assistance.

Annex I.—RETURN of all Shipping Entered and Cleared at the Open Ports of Corea during the Year 1893.

ENTERED.

Nationality.	Chemulpo.				Fusan.				Wonsan.				Corea.	
	Sailing.		Steam.		Sailing.		Steam.		Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	...	...	...	...	...	...	...	...	...	...	...	...
Corean	141	6,133	16	24,186	...	579	27	6,638	...	92	...	...	...	...
Japanese	136	6,774	99	73,305	394	12,366	236	155,939	41	8,429	38	82,411	290	41,469
Russian	...	...	...	...	...	...	...	...	...	...	49	956	...	304,224
Chinese	19	365	18	14,011	...	...	15	10,725	...	...	15	10,263	30	20,993
German	...	...	6	4,776	...	...	2	1,592	...	...	...	...	37	14,376
Norwegian	...	...	...	...	...	...	...	...	...	...	...	...	8	6,368
American	...	...	...	...	...	...	1	...	...	...	...	...	...	...
Total	298	13,272	199	116,278	401	12,945	280	174,974	42	3,621	102	66,517	1,322	387,507
" for the preceding year...	325	14,593	193	118,939	480	14,197	255	171,205	43	2,531	85	68,627	1,386	390,497

CLEARED.

Nationality.	Chemulpo.				Fusan.				Wonsan.				Corea.	
	Sailing.		Steam.		Sailing.		Steam.		Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	...	...	...	...	...	...	...	...	...	...	...	...
Corean	136	5,942	77	24,173	...	...	...	6,638	...	92	...	...	...	...
Japanese	155	7,113	98	72,434	390	12,068	236	155,939	40	8,226	38	82,411	286	41,232
Russian	...	...	...	...	...	...	...	...	...	...	49	956	...	303,191
Chinese	20	422	18	14,011	...	...	15	10,725	...	...	15	10,263	30	20,993
German	...	...	6	4,776	...	...	2	1,592	...	...	...	...	38	14,433
Norwegian	...	...	1	444	...	...	...	...	...	...	...	...	8	6,368
American	...	...	...	...	...	...	1	...	...	...	...	...	1	...
Total	311	13,477	200	115,938	397	12,647	280	174,974	41	3,318	102	66,517	1,331	386,771
" for the preceding year...	336	15,241	199	119,233	499	14,706	255	171,205	44	2,590	85	68,627	1,418	391,706

Annex II.—RETURN of the Principal Articles of Export (Net) from the Treaty Ports of Corea during the Years 1893-92.

Articles.	Chemulpo.						Fusan.						Wonsan.					
	1893.			1892.			1893.			1892.			1893.			1892.		
	Quantity.	Value.		Quantity.	Value.		Quantity.	Value.		Quantity.	Value.		Quantity.	Value.		Quantity.	Value.	
Beans and peas	...	...	Piculs	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...
Beche-de-mer	157,275	28,664	...	261,699	52,227	...	167,985	42,374	...	269,298	65,207	...	45,138	8,843	...	14,251	3,120	...
Fish	...	...	"	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...
Hides, cow	762	537	"	183	405	...	61,926	2,506	...	807	1,991	...	387	1,465	...	162	444	...
Cotton piece-goods	5,856	9,892	"	7,427	16,200	...	9,810	16,832	...	45,332	15,970	...	79,422	84,896	...	63,538	52,978	...
Opium	1,923	843	Pieces	12,862	1,343	...	269,890	83,685	...	8,114	17,982	...	3,497	6,304	...	4,927	10,709	...
Tea	1,834	5,845	"	1,834	5,845	...	...	...	...	...	...	...	...	...	...	...	...	...
Wool	152,366	41,345	Piculs	263,164	79,655	...	50,743	15,382	...	365,968	117,710	...	360	101	...	1,443	615	...
Seaweed	482	194	"	...	...	...	15,482	6,432	...	17,663	7,654	...	1,550	636	...	4,893	2,623	...
Sharks' fins	...	...	"	...	...	...	331	1,430	...	327	1,553	...	9	28	...	...	428	...
Skins	27,477	1,541	Pieces	17,266	1,356	...	...	...	...	...	...	...	6,478	327	...	13,868	...	...
Wheat	3,050	677	"	23,591	5,560	...	1,712	427	...	4,840	1,316	...	...	...	...	...	...	...
Other articles	...	9,600	Piculs	...	18,235	...	...	8,294	...	...	6,822	...	...	13,073	...	...	15,417	...
Total	...	98,141	...	...	178,595	...	...	152,219	...	...	264,082	...	...	65,673	...	...	86,334	...

Exchange: 1892, 1 dol. = 3s.; 1893, 1 dol. = 2s. 6d.

1 picul = 133½ lbs. avoirdupois.

Annex III.—RETURN of the Principal Articles of Foreign Import (excluding Re-Imports) to the Open Ports of Corea during the Years 1893–92.

(1795)

Articles.	Chemulpo.				Fusan.				Wonsan.			
	1893.		1892.		1893.		1892.		1893.		1892.	
	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.
Cotons—												
Shirtings	224,882	81,337	289,367	125,361	72,051	25,780	98,156	42,514	90,992	35,386	88,427	40,901
Shirtings*	2,788	1,066	11,204	6,246	894	396	5,484	2,743	1,170	578	1,573	894
Leaves and mailins	99,308	8,043	140,375	14,351	46,062	5,725	101,378	15,561	25,382	3,118	22,855	3,653
Leaves	53,765	15,125	88,325	25,607	...	...	...	...	...	...	...	...
Sheetings	1,065	2,643	9,781	4,378	...	...	...	...	26	24	141	74
Chinese nankens	31,290	1,763	25,648	1,456	...	...	...	...	11,415	613	11,798	707
Japanese piece-goods	18,454	1,783	53,648	5,837	41,762	2,999	57,001	4,469	10,916	902	9,068	934
Yarn and thread	...	2,733	1,282	5,162	144	574	724	2,816	688	2,668	767	3,623
Other cottons	...	4,386	...	9,037	...	1,440	...	1,910	...	1,560	...	2,329
Total	...	118,031	...	194,055	...	36,914	...	70,013	...	44,739	...	53,119
Woolens	...	3,022	...	3,100	...	566	...	1,205	...	264	...	347
Metals—												
Copper	923	1,966	5,243	13,759	1,731	3,996	2,260	5,770	800	1,685	869	2,196
Iron	6,163	2,090	10,581	3,792	2,670	1,103	2,879	1,484	1,154	682	784	540
Tin	...	1,453	564	3,268	324	1,395	405	2,302	495	2,454	324	1,762
Old brass	1,245	2,403	1,430	2,353	...	...	...	5,231	...	1,050	...	...
Manufactured	...	1,193	...	11,309	...	3,112	...	3,686	...	1,450	...	1,070
Other metals	...	...	...	...	...	2,103	...	...	...	...	...	501
Total	...	9,110	...	34,458	...	11,717	...	17,873	...	6,321	...	6,069
Sundries—												
Arms	...	297	...	4,602	...	...	...	...	...	...	...	...
Coal and coke	3,801	1,748	4,141	3,059	...	...	1,373	1,021	...	...	...	...
Cotton, raw	1,633	3,142	771	2,136	791	384	...	...	...	...	...	...
Yarn	904	4,482	994	6,056	93	291	267	2,789	2,980	7,104	168	181
Yarn cloth	...	7,162	...	14,767	226	376	...	1,955	87	...	82	5,751
Matches	90,650	3,318	62,177	3,226	119,089	3,128	156,489	4,924	9,372	354	3,407	723
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RETURN of the Principal Articles of Foreign Import (excluding Re-Imports) to the Open Ports of Corea during the
Years 1893-92—continued.

Articles.	Chemulpo.						Fusan.						Wonsan.					
	1893.			1892.			1893.			1892.			1893.			1892.		
	Quantity.	Value. £	Quantity.	Value. £	Quantity.	Value. £	Quantity.	Value. £	Quantity.	Value. £	Quantity.	Value. £	Quantity.	Value. £	Quantity.	Value. £	Quantity.	Value. £
Sundries—continued—																		
Medicines	45,770	1,889	...	2,073	...	...	...	596	...	...	...	835	...	...	...	...	74	...
Needles	...	1,044	...	747	...	...	...	...	...	...	...	...	...	...	...	...	...	...
Kerosene—																		
American	412,710	10,004	342,430	9,324	288,130	7,532	288,130	7,532	256,103	6,969	161,810	6,969	...	3,678	125,030	3,763	...	...
British	42,400	1,081	1,000	27	19,450	507	19,450	507	2,343	1,469	1,500	1,469	...	...	3,000	90	...	...
Paper	1,689	1,959	1,255	2,154	...	...	...	856	188	359	84	359	...	183	...	183	...	...
Porcelain, Japanese	3,230	1,705	4,696	3,582	...	...	...	724	...	944	...	944	...	308	...	...	...	...
Provisions	...	2,085	...	5,470	...	...	...	1,244	...	2,565	...	2,565	...	201	...	...	...	...
Salt	4,033	2,456	3,871	3,119	...	...	...	1,855	...	2,491	...	2,491	...	750	...	...	...	...
Salt	16,494	944	26,747	2,157	114,360	2,304	114,360	2,304	73,886	5,811	44,168	5,811	...	2,680	26,988	2,123	...	...
Silk piece-goods	66,374	37,663	65,309	45,153	6,041	...	...	2,768	10,091	5,294	...	5,294	...	4,642	...	4,923	...	...
Skins	...	2,216	...	3,636	...	...	...	383	1,244	1,350	...	1,350	...	...	...	171	...	...
Sugar	2,351	2,316	8,377	2,281	1,003	...	...	2,495	...	4,240	...	4,240	...	...	...	...	...	...
Tobacco	24,317	1,816	106,708	1,202	...	...	...	876	19,789	549	...	549	...	84	...	101	...	...
Unclassified	...	419	20,488	832	15,083	...	...	18,461	...	22,497	...	22,497	...	7,402	...	4,665	...	...
Other articles	...	39,075	...	43,268	...	...	...	...	...	...	...	...	...	...	...	...	...	...
Total	...	125,538	...	162,651	...	...	...	51,414	...	66,464	...	66,464	...	29,912	...	25,173	...	...
Grand total	...	256,701	...	394,264	...	...	...	100,611	...	155,555	...	155,555	...	91,236	...	84,703	...	...

Total (net) imports to Corea from foreign countries ...

1893. 437,598

1892. 634,527

FOREIGN OFFICE.

1894.

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AND FINANCE.

COSTA RICA.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF COSTA RICA.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1219.

*Presented to both Houses of Parliament by Command of Her Majesty,
APRIL, 1894.*

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COSTA RICA.

SAN JOSÉ.

Consul Sharpe to the Earl of Kimberley.

My Lord,

San José, March 10, 1894.

I HAVE the honour to transmit, enclosed, my Annual Report on the Trade and Commerce of Costa Rica for the year 1893.

I have, &c.

(Signed) CECIL SHARPE.

Report on the Trade and Commerce of Costa Rica for the Year 1893.

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Costa Rica climate. Scenery.	I opened my last report with a synopsis of the geographical position and other data of interest of this Republic, not only to the commercial traveller, but also to the seeker of a congenial climate, where he may escape from the severe winters of the northern climes, and enjoy scenery which cannot be surpassed for beauty. Port Limon on the Atlantic is the last port of call of the Royal Mail Steam Packet Company's boats, once a month, where they remain 5 days, allowing passengers time to visit the capital of San José and to return by the same steamer if they so desire. Several seekers after health and pleasure have availed themselves this year of this opportunity, and have been well contented with their visit.
Visit to capital.	
Visitors contented.	
Trade depressed.	In sympathy with business generally all over the world, and especially in those countries based on a silver currency, trade has been much depressed and unremunerative, and Costa Rica has not been an exception, notwithstanding the continued high prices of coffee have considerably helped the country, whose chief export is that produce, and consequently agriculturists have not suffered so much as merchants, who depend upon large crops and low rates of exchange for a successful business, neither of which resulted in their favour during the year under review. Several failures, therefore, have taken place, some of which have obtained an extension of time with good securities, and others have made a composition or gone through the courts.
Commercial failures.	
Chicago fair.	Costa Rica was well represented at the great exhibition held at Chicago and obtained numerous premiums and honourable mentions, not only for the varieties of fine qualities of coffee, but also for its Indian collections of gold, stone, and pottery, stuffed birds, and local industries.
Contracts and concessions.	The following contracts have been made and concessions given during the past year :—
Swedish or Norwegian immigration.	January 3, 1893.—Contract with Carlos Berggren for the introduction of 100 Swedish or Norwegian agriculturists for the district of San Carlos, each colonist to bring with him the equivalent of 600 dol. Costa Rican currency to invest in permanent works, 20 colonists, at least, to be established by the end of the year, and the remaining 80 by December 31, 1894. The Government gives each colonist about 50 acres of land.

March 24.—Concession to Julio E. Vanderlaat, with exclusive privilege for 2 years for the manufacture of paving tiles for paving varnished or enamelled, with introduction free of duty of all machinery and materials required for said industry. Concession for paving tiles.

April 12.—Contract with Francisco Mendiola Boza, and concession for 10 years for the establishing of the system of telephones in the Republic, exemption of duties on all material and apparatus necessary for same. One year after it is duly established, the Government may acquire same, by paying the contractor the cost of installation and 50 per cent. more by way of indemnity; after the second year, 25 per cent.; after the third year, 15 per cent.; after the fourth year, 10 per cent.; and if during the fifth year, the cost of installation only. Telephone concession.

August 23.—The concessions of lands granted to William Hornell Reynolds, in Talamanca, July 31, 1891, have been transferred to the "Colonising Company of Talamanca," with a capital of 100,000 dol. Transfer of Talamanca concession.

August 24.—Contract with Mr. Minor C. Keith, giving him the enjoyment for 50 years of about 400 hectares of the maritime mile reserved by the Government on each side of the Banano River. Mr. Keith engages to cultivate at least one-third with cocoa and the rest with bananas, sugar-cane, vegetables, &c. He cannot disturb third parties already occupying these reserved Government lands, and agrees to pay to the funds of the Limon Hospital after three years, and until the expiration of the contract, 500 dol. Costa Rican currency every 6 months.

August 24.—A similar concession as the former was granted to Jorge Kaempffer, for the cultivation of 600 hectares of land on the maritime mile to the north and south of the Banano River.

September 4.—Also a similar concession to Oscar Mott, an American citizen, for the usufruct for 50 years of 5,000 hectares of the maritime mile on the Atlantic Coast by the Sixdola River. Mott engages to form a company with sufficient capital within 6 months from date.

October 6.—Approval by Government of formation of "The Industrial and Agricultural Company of Costa Rica," with a capital of 500,000 dol., and the transfer to said Company of the following contracts:—

(1) Between the Government and Mr. Keith, dated March 28, 1892, for the execution of various works in Limon.

(2) Contract of November 3, 1892, between the Government and Ricardo Schutt, transferred to Mr. Keith, modified and added to July 28, 1893, for the construction of a railroad between Limon and Banano River.

October 27.—Concession to the "Colonising Company of Talamanca" of the enjoyment for 50 years of 1,565 hectares of the reserved maritime mile from Point Cahuita to Point Piplekey, a distance of about 7 miles parallel to the lands denounced and cleared by said company, as cessionaries of the W. H. Reynolds' concession July, 1891, one-third of which land

is to be planted with cocoa, and the rest with bananas, sugarcane, coffee, and pasture land.

Concession of the usufruct for 50 years of the Island of Chira.

November 20.—Concession to Buenaventura Carazo, of the Island of Chira, in the Gulf of Nicoya, on the Pacific, for 50 years; to be planted with cocoa, rubber, bananas, sugarcane, &c.

Conversion of Costa Rican currency into at 11 dol. per 17. sterling.

The items of Costa Rican currency, where converted in this report into sterling, are calculated at the average rate of exchange for the year, at say 11 dol. per 17. or 120 per cent. premium as against 100 per cent. last year.

Customs Tariff.

Alterations in customs tariff.

The following alterations in the duties have taken place:—
On imports, viz., machinery for making sugar, for a term of 2 years, free.

Rice, duty reduced from 7 c. to 2 c. per kilo.

Cognac, whisky, gin, and other spirits, in barrels or demijohns, 1 dol. 5 c., instead of 80 c., per kilo. The same in any other form 80 c., instead of 60 c., per kilo.

Liqueurs, in barrels or demijohns, 1 dol. 5 c., instead of 60 c. per kilo. The same in any other form 80 c., instead of 45 c. per kilo.

Champagne in any form 1 dol. 5 c., instead of 9 c. per kilo.

Duties on exports of coffee and woods.

On exports the following duties were imposed:—

On woods, by the Pacific port, 1 dol. per ton.

On coffee, 6s. per 100 lbs., the previous tax of 20 c. per 100 lbs., created for the purpose of providing funds for the building of the National Theatre, having been withdrawn, and replaced by a 1 c. per kilo. tax on all imports from July 1, 1893.

Income and Expenditure.

Finance Minister's Report for 1893 not published.

Owing to the dissolution of Congress at the end of August, 1892, followed by the suspension of personal guarantees, the Minister of Finance's report for the year ending March 31, 1893, was not presented or printed, and as that for 1893–94 will not be published, in the ordinary course, for another 2 months, the only data at my disposal are the estimates of income and expenditure for that period, published in the Official Gazette in September last:—

Estimates, 1893–94.

Year.		Amount.	
		Currency.	Sterling.
1893–94.. ..	Income	Dollars. 4,800,000	£ 436,363
1893–94.. ..	Expenditure....	4,741,840	431,080

For the reasons stated above, no comparison can be made with the previous year's estimates, and even were it possible, the higher rates of exchange taken for the conversion of the Costa Rican currency into sterling would not give a correct idea of the increase or diminution of income, as since 1887 exchange has gradually risen, so that the currency items now converted at 120 per cent. premium, as against 30 per cent. in 1888, show no increase in income in sterling, whereas in Costa Rican currency there is an improvement of 80 per cent., as I proceed to show, viz. :—

Year.					Currency.	Exchange.	Sterling.
					Dollars.	Per cent.	£
1888	..	..	..	Income	2,848,123	30	438,173
1893	..	..	..	"	4,800,000	120	436,363

High exchange influences adversely Costa Rican currency.

the import duties not having been increased meanwhile.

The income of the Republic is chiefly derived from the customs duties and the Government monopolies of spirits and tobacco. The revenue from other sources, viz., post office, telegraphs, stamped paper, licenses, &c., are comparatively small.

Imports.

The importations have been somewhat larger than in the previous year, the total value being 5,833,427 dol. (530,315£), as against 5,389,749 dol. (538,974£) in 1892, the difference in sterling being due to the conversion at a higher rate of exchange, but, as stated in previous reports, the value of imports is taken from the consular invoices converted at par, so that, to arrive at the true value in Costa Rican currency, the exchange of 120 per cent. should be added, making a sum total of 14,683,567 dol. necessary to pay in equivalent abroad in sterling of 1,166,685£. The chief imports are from Great Britain, the United States of America, Germany, France, United States of Columbia, and Spain, in their respective order.

Exports.

The exports for the year were much the same as last, giving a total of 9,619,064 dol. (874,461£), chiefly composed of coffee and bananas, but I am led to believe that the "value on board" of bananas is much under-estimated, and that instead of 71,500£ it should be nearer 97,000£, thus altering the gross total to 9,905,064 dol. (900,461£).

The following table shows the returns of the chief exports for 1893 obtained from the Statistical Office, the greater (1724)

Exports.

portion of which were shipped to London and the United States:—

CHIEF Exports of Costa Rica during the Year 1893.

Articles.		Quantity.	Value on board.	
			Currency.	Sterling.
			Dollars.	£
Bananas	Bunches	1,278,647	786,493	71,500
Coffee	Bags ..	197,349	8,354,930	759,539
Hides and skins ..	Packages	5,817	138,431	12,586
Rubber	"	287	17,179	1,561
Cocoa	"	56	4,390	399
Cedar	Logs ..	5,077	98,891	8,990
Woods, various ..	"	6,102	87,640	7,967
Bullion	Gold ..	13	110,150	} 10,293
"	Silver ..	..	3,070	
Sundries	"	..	17,890	1,626
Total	..	..	9,619,064	874,461

Out of a crop of 197,349 bags of coffee 112,416 bags found their way to England, and 76,163 bags to New York and San Francisco. All the bananas were shipped from Port Limon to New York and New Orleans.

Increase in
production
of coffee and
bananas.

In the near future, owing to large tracts of land being taken up for coffee planting, it is highly probable that a considerable increase in the export of that produce will take place, as also of bananas, the cultivation of which is increasing rapidly.

Shipping and Navigation.

With the opening up of Port Limon the shipping at Puntarenas, on the Pacific, is giving way to the newer and more convenient port of entry of the Republic. The tonnage entering that port is steadily increasing, and with the facilities offered by the Costa Rica Railroad Company of a "through bill of lading," all importations from Europe will shortly be carried direct up to the capital of San José. The present crop of coffee is already being carried to Europe on a "through bill of lading," which is a great convenience to shippers. Contracts have been entered into between the Government of Costa Rica and the respective agents of the Hamburg-American and French trans-Atlantic lines of steamers for calling at Port Limon at least once a month, the term of contract being for 5 years. The "Prince" line is also about to run its steamers to Port Limon under a similar contract. The total entries and clearings at both Puntarenas and Limon will be seen in the following tables:—

RETURN of all Shipping at the Port of Limon during the Year 1893.

ENTERED.

Nationality.	Steam.		Sailing.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	124	169,244	...	...	124	169,244
North American ...	15	15,002	3	1,112	18	16,114
German	20	32,431	...	...	20	32,431
French	7	9,270	...	...	7	9,270
Spanish	10	15,024	...	...	10	15,024
Nicaraguan... ..	16	3,600	...	...	16	3,600
Norwegian	27	18,000	...	...	27	18,000
Columbian	...	...	1	8	1	8
Total	219	262,571	4	1,120	223	263,691
„ for the year preceding ...	175	201,961	15	1,719	190	203,680

CLEARED.

Nationality.	Steam.		Sailing.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	124	169,244	...	...	124	169,244
North American ...	15	15,002	3	1,112	18	16,114
German	20	32,431	...	...	20	32,431
French	7	9,270	...	...	7	9,270
Spanish	10	15,024	...	...	10	15,024
Nicaraguan	16	3,600	...	...	16	3,600
Norwegian	27	18,000	...	...	27	18,000
Columbian	...	...	1	8	1	8
Total	219	262,571	4	1,120	223	263,691
„ for the year preceding ...	175	201,961	14	1,715	189	203,676

RETURN of all Shipping at the Port of Puntarenas during the Year 1893.

ENTERED.

Nationality.	Steam.		Sailing.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	27	17,604	2	1,460	29	19,064
North American ...	77	112,875	2	1,197	79	114,072
German	20	25,723	7	4,832	27	30,555
Columbian	8	1,768	3	98	11	1,866
Italian	...	...	1	878	1	878
Danish	...	...	1	320	1	320
Norwegian	...	...	1	718	1	718
Costa Rican	5	270	...	...	5	270
Peruvian	...	...	1	50	1	50
Total	187	168,240	18	9,553	155	167,793
„ for the year preceding ...	143	169,147	39	15,672	182	184,819

CLEARED.

Nationality.	Steam.		Sailing.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	27	17,604	2	1,768	29	19,372
North American ...	77	112,875	2	1,197	79	114,072
German ...	20	26,723	10	6,269	30	31,992
Columbian ...	8	1,768	3	98	11	1,866
Italian ...	...	...	1	878	1	878
Danish ...	...	...	1	320	1	320
Norwegian ...	...	...	2	1,305	2	1,305
Costa Rican ...	5	270	...	...	5	270
Peruvian ...	...	...	1	50	1	50
Total ...	137	158,240	22	11,885	159	170,125
„ for the year preceding ...	143	169,147	35	13,258	178	182,405

Agriculture.

The cultivation of coffee is increasing, and new lands are being taken up, especially on the line of railroad between Cartago and Reventazon, which, although an experiment, bids fair to become a most productive and profitable undertaking. All suitable coffee lands in the interior have long ago been utilised, but many estates have been neglected in past years when coffee was unremunerative; consequently, the production has not increased with the growth of years. Nevertheless, greater attention is now being given to them by manuring and replacing old trees, as also to better class of machinery, which will all tend to improve their plantations, and give better value to their coffee in foreign markets, all very necessary if the present export duty of 6s. per 100 lbs., imposed in October last, be not removed. The cultivation of bananas is also extending, especially on the lower lands of the Atlantic coast, where several concessions have been granted with the view of planting bananas and cocoa. A railroad is being constructed to the head waters of the Banano River, then south along the coast, opening up most valuable lands, with a great variety of good timbers.

Banana
planting
increasing.

The export of bananas will be considerably increased in the course of the year 1894, notwithstanding that many of the old lands are now past giving good shipping fruit. Preference is given to banana planting on account of its rapid growth and quick returns, but cocoa is also very profitable, but requires 4 to 5 years before yielding a crop.

Cocoa
profitable.

In the interior Indian corn, black beans, and rice (the staple food of the peasantry) are cultivated, but owing to the bad condition of the roads during the wet season it is found cheaper to import them, thus depriving the country of the benefit of its own production.

Many attempts are made by local authorities every year to improve the roads to the capital, but they are only very imperfectly and temporarily done, so that the money spent on them is almost thrown away.

Immigration.

Several concessions have been granted from time to time for the introduction of immigrants, but none can be said to have turned out very successfully. Early in the year another contract was made for the introduction of Swedes or Norwegians for the district of San Carlos.

The want of good roads and means of communication is again here a great drawback, and it is to be hoped that before long some improvement will take place in this direction, as the country is only waiting to be populated in order to prove its fertile resources. Need of good roads.

Banking and Exchange.

The all absorbing silver question and its depreciation, with its consequent rise in exchange, has seriously hurt the community, especially those with large stocks of merchandise obtained on credit abroad, as also those who have brought capital into the country when on a gold basis, and are now unable to reconvert same, except at a great sacrifice. The Government, however, is doing all in its power to place the currency of the country on a safer basis.

Owing to the abrogation of the law authorising the Bank of Costa Rica to circulate notes for quadruple of its capital, instead of double, as originally granted, this establishment has been withdrawing its notes to conform with the law, and so caused considerable stringency in the money market. This action cannot have but a wholesome effect in checking over-speculation and trading which had become rife, and of reducing business to legitimate transactions, however disagreeable the operation may be to individuals. It will also tend to lower the rate of exchange, when the currency is placed on a safer silver basis. Rates of discount throughout the year have ranged from 12 per cent. to 15 per cent. per annum. Interests on deposits at 12 months' call, 6 per cent. Withdrawal of notes of Bank of Costa Rica.

Both the Bank of Costa Rica and the Anglo-Costa Rican Bank have done good business, and their money has been well occupied.

At the commencement of the year 90 days' Bills on London were quoted at 106 per cent., but gradually rose, till in October they reached 155 per cent. premium, dropping gently again to 145 per cent., at which they stood at the end of the year. The future of exchange is difficult to forecast, for having receded to 140 per cent. in January, 1894, whilst preparing this report, it is now taking an upward course (due to the small coffee crop), and it is impossible to say where it will stop. Exchange.

Only great caution on the part of importers and a large coffee crop next season can stem the upward movement—that is to say, when the exports of the country, which represent

gold, greatly exceed the imports, then only can we hope to see exchange reach a normal position.

Railways.

The Costa Rica Railroad Company have issued a "through Bill of lading" from Alajuela (the end of the line) to European and North American ports, with the Royal Mail Steam Packet Company, Atlas Steamship Company, Hamburg and American Line, and the Prince Line of steamers on all exports, payable at the port of destination, and they are now preparing to do the same on imports.

The short, difficult, and expensive piece of line to keep up between Carrillo and Toro Amarillo has by mutual consent of all parties been abandoned.

A further extension of time to January 1, 1895, was granted to Mr. Minor C. Keith for forming a company to open up a branch line from the Atlantic Railroad to the borders of Nicaragua, to be finished by January 1, 1898, which if carried through will open up the fertile lands of San Carlos, suitable for bananas, coffee, and other produce.

As stated under the heading of agriculture, a line of railroad is being constructed on the Banano River and the coast line of Port Limon, which will open up rich banana lands.

External and Internal Debt.

External
debt.

In order to ensure the payment of the dividend on July 1 next, the Government imposed an export tax of 6s. per 100 lb. of cleaned coffee, payable here in Bills of Exchange on London at 90 days' sight, which are being transmitted to London expressly for that purpose. Whether this impost will be continued, or another method devised for meeting the future dividends, the new Government, shortly to come into power, will decide.

I am unable to give the exact amount of the Floating Internal debt, not having any data for 1893, but on March 31, 1892, it was 2,509,668 dol. (228,150L.), and I have reason to believe that it has rather been diminished than increased.

Public Works.

National
theatre.

The new theatre has made much progress, and is an imposing edifice. It will perhaps be opened towards the end of the year.

Iron school-
house.

A large iron schoolhouse for boys and girls is being constructed in the Park of Morazan, on the Station road, and is nearing completion. It was imported from Belgium.

Electric
light.

The electric light is coming more into general use every day, both for public buildings and for private dwellings.

The telephone has been introduced under concession granted to Mr. Francisco Mendiola Boza, and is in use in all the principal commercial houses. It will soon be extended to the provinces. Telephone.

Two large churches, the one in San José, to replace the church of "La Merced," and another to replace one in the village of Grecia, both seriously damaged by the earthquake of December, 1888, are being rebuilt, chiefly of iron imported from Belgium. Iron churches.

The old concessions for laying a tramway in the city having fallen through, another one has been given to Carlos Volio Tinoco and Alberto and Rafael González Ramirez. Many new residences are being erected, and the town of San José is extending in all directions, and roads are being levelled and macadamized. Tramway concessions.

Port Limon.

This port has greatly improved under the two last administrations and is becoming of greater importance as a port of call.

The business on the coast has been considerably developed, and large tracts of land have been conceded, and companies formed for bringing them under cultivation. Development of coast business.

The town itself is prettily situated, and many important buildings have been erected, including a masonic temple and a large edifice.

There is a manufactory for making ice, aerated waters, and beer, belonging lately to Messrs. Joseph and Kurtz, but now the property of Messrs. Wichmann and Bornemann. Ice, aerated water, and beer manufactory.

The contract, made with Mr. Minor C. Keith by the Government in March, 1892, for reclaiming the coral reef, building retaining walls, and filling in the town, and providing proper drainage, &c., was transferred over to the "Industrial and Agricultural Company of Costa Rica," and the said works are progressing satisfactorily. Limon improvements.

One of the finest farms, overlooking the bay, consisting of about 400 acres of bananas and cocoa, belongs to Mrs. L. C. Arnold, and is one of the most valuable in the vicinity. Mrs. Arnold's farm.

Although from time to time a few cases of fever break out, they can generally be traced to causes independent of the town itself, being either imported or contracted through imprudence; otherwise the town for the most part is clean and healthy. Health of port.

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AND FINANCE.

DENMARK.

REPORT FOR THE YEARS 1894-95

ON THE

FINANCES OF DENMARK.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 984.

*Presented to both Houses of Parliament by Command of Her Majesty,
JUNE, 1894.*

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No. 1410.

Reference to previous Report, Annual Series No. 984.

DENMARK.

COPENHAGEN.

Mr. Scott to the Earl of Kimberley.

My Lord,

Copenhagen, May 12, 1894.

I HAVE the honour to transmit herewith a Memorandum by Sir F. Denys upon the Revenue and Expenditure of the Danish Government for the Financial Year 1894-95.

I have, &c.

(Signed) CHARLES S. SCOTT.

Sir F. Denys to Mr. Scott.

Sir,

Copenhagen, May 14, 1894.

I HAVE the honour to enclose herewith a summary of the Estimated Revenue and Expenditure of the Danish Government for the Financial Year April 1, 1894 to March 31, 1895, together with a short explanatory Memorandum respecting its more interesting items.

I have, &c.

(Signed) FRANCIS DENYS.

Memorandum on the Revenue and Expenditure of Denmark for the Financial Year 1894-95.

ABSTRACT of Contents.

	PAGE
Observations on passing of Budget	2
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Expenditure	2
Chief credits	3
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(1774)	A 2

The budget for the current year is the first which has been voted by both Chambers of the Rigsdag since that for the year 1884-85, supplies having been meanwhile appropriated by royal mandate in the form of a provisional law.

The main point of disagreement between the two Chambers of the Rigsdag has been the expenditure on the fortifications of Copenhagen, to which the majority in the Folkething were irreconcilably opposed.

This expenditure has been largely met by drafts on the reserve fund, which has undergone considerable reduction, chiefly owing to this and to contributions towards certain undertakings sanctioned under the provisional Law.

Reserve fund. The reserve fund was officially stated to stand at 17,849,354 kroner (nearly 1,000,000*l.*) on March 31, 1894, while on March 31, 1885 it amounted to no less than 58,000,000 kroner (3,222,000*l.*), a reduction of more than 40,000,000 kroner.

For facility of comparison, a summary of the estimated revenue and expenditure for the year 1893-94 and for the year 1894-95 is also given, from which it will be seen that the figures under the various heads show, as usual, but trifling changes, a matter of congratulation to Denmark, where the rigid economy exercised in all branches of the public service does not appear to impair their efficiency.

Revenue. The revenue for 1894-95 is estimated at 3,126,753*l.*, and the expenditure at 2,967,733*l.*, thus showing a surplus of revenue over expenditure of 159,020*l.*

Direct taxes represent 17·85 per cent., and indirect taxes 67·85 per cent. of the total revenue, customs alone representing 41·071 per cent.

From the postal and telegraph service, no profit continues to be derived. The postal service which was estimated to be worked at a loss in 1893-94 of 48,965 kroner (2,720*l.*) is expected, however, to show a profit for 1894-95 of 21,952 kroner (1,219*l.*), while on the telegraph service the loss estimated is 121,845 kroner (6,769*l.*) and 65,294 kroner (3,627*l.*) for the same years respectively.

Thus the loss on the two services was estimated for 1893-94 at 170,810 kroner (9,489*l.*), and that for the current year at only 43,342 kroner (2,407*l.*).

State railways are expected to bring in a net revenue in 1894-95 of 3,241,922 kroner (180,106*l.*) against an estimate of 3,266,796 kroner (181,488*l.*) in 1893-94.

Expenditure.

Expenditure. The principal feature in the new budget for the War Department is the disappearance of the sum of 575,205 kroner (31,955*l.*) for the gendarmerie, which force has now been disbanded, as a concession to the opposition in the Folkething; while on the other hand the Government has obtained several credits for the maintenance and equipment of the land and sea fortifications of Copenhagen, the expenditure on which the opposition has hitherto declined to recognise.

The total estimate for the War Department amounts to 547,439*l.*, and that for the navy to 362,177*l.* The service of the Internal Debt absorbs 347,671*l.*, and of the Foreign Debt 11,416*l.* A sum of 97,222*l.* is set aside for the reduction of the Public Debt. The Home Department estimate is 300,550*l.*

The King's Civil List is represented by the fixed annual sum of 55,555*l.* and the allowances to the Royal Family amount to 8,622*l.*

Various and extraordinary expenditure is estimated at 244,493*l.* of which 33,216*l.* is credited to the War Department, and 37,038*l.* to the Marine Department.

The remaining items in the budget call for no special remark.

SUMMARY.

REVENUE.

Description.	Amount.			
	1893-94.		1894-95.	
	Kroner.	Kroner.	Kroner.	Kroner.
Balance of Domain revenues	..	767,406	..	835,885
Interest on State assets	..	4,515,716	..	4,470,932
Direct taxes	..	9,763,500	..	9,874,100
Indirect taxes	..	37,609,000	..	38,299,000
Stamp Duty	2,591,000	..	2,620,000	..
Succession Duty	1,263,000	..	1,330,000	..
Transfer of Property Duty	667,000	..	669,000	..
Judicial and Departmental Fees	2,002,000	..	2,000,000	..
Customs	22,244,000	..	23,065,000	..
Import duties	1,262,000	..	1,280,000	..
Spirit tax	2,947,000	..	2,970,000	..
Beer tax	3,407,000	..	3,522,000	..
Various taxes	1,276,000	..	893,000	..
Postal and Telegraph Service	..	..	..	..
Balance of lotteries	..	1,000,000	..	1,039,000
Revenue from Faroe Islands	..	38,777	..	38,777
Separate revenues	..	522,545	..	547,706
Revenue from employment of property and funds, and funding of debt	..	1,314,671	..	1,176,168
Total	37,659,000*	55,531,617	38,349,000*	56,281,568
Equiv. at 18 kroner to <i>l.</i>	..	3,085,089 <i>l.</i>	..	3,126,753 <i>l.</i>

* From each total a sum of 50,000 kroner is deducted for import duties on railway material, &c.

NOTE.—Exchange taken at the rate of 18 kroner to the *l.*

EXPENDITURE.

Description.	Amount.	
	1893-94.	1894-95.
	Kroner.	Kroner.
The King's Civil List	1,000,000	1,000,000
Royal Appanages	155,200	155,200
Rigsdag	200,000	200,000
Council of State	106,616	107,016
Interest on National Debt—		
Internal Debt	6,330,680	6,258,080
Foreign Debt	391,500	385,500
Pensions, including military		
invalids	3,310,967	3,269,169
Ministry of Foreign Affairs ..	429,655	585,256
" Interior	5,227,945	5,409,908
" Justice	3,935,556	3,970,906
" Public Worship and		
Instruction	3,625,448	3,499,681
" War	10,631,950	9,852,907
" Marine	6,690,725	6,519,818
" Finance	3,516,304	3,562,227
" Iceland	88,664	87,630
Extraordinary State expenses ..	5,133,702	4,400,884
Reduction of Public Debt ..	1,797,100	1,750,000
Acquisition of properties, &c. ..	1,656,642	2,405,012
Total	54,228,659	53,419,194
Equiv. at 18 kroner to £.	3,012,703 <i>l</i> .	2,967,733 <i>l</i> .
Balance	72,386 <i>l</i> .	159,020 <i>l</i> .
Total	3,085,089 <i>l</i> .	3,126,753 <i>l</i> .

NOTE.—The discrepancy in the addition is owing to omission of the ore.

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DENMARK.

REPORT FOR THE YEAR 1893

ON THE

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No. 1430.

Reference to previous Report, Annual Series No. 1090.

DENMARK.

COPENHAGEN.

Consul Inglis to the Earl of Kimberley.

My Lord,

Copenhagen, June 25, 1894.

I HAVE the honour to transmit to your Lordship herewith a Report on the Agriculture of Denmark for the year 1893.

I have, &c.

(Signed) A. P. INGLIS.

Report on the Agriculture of Denmark for the Year 1893.

ABSTRACT of Contents.

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Harvest of
1893.

In the annual report* just issued by the Royal Danish Statistical Department the harvest of 1893 is shown to have given under a middling yield. Of the various crops only rye and potatoes may be said to have given a really good return, both in quantity and quality.

Wheat, especially as regards quality, gave a fair middling yield, the output of roots may also be put down as that of a middling year.

General
character.

On the other hand spring sowings, beans, peas, and hay gave a short return, a little over middling in quality. Altogether the character of the harvest varied considerably in different districts according to amount of rainfall and other local circumstances.

Weather.

The chief features of the year as regards weather were an unusually severe winter followed by a very warm and dry summer. Winter sowings where done early developed well, and taken as a whole successfully withstood the hard winter, though suffering in some places from protracted snowfalls. The early spring, especially March and the first half of April, was comparatively mild, and winter sowings came on well, but these conditions sustained a check at the end of April, owing to the cold winds then prevalent, and from that period things took a very unfavourable turn. The weather which from early April had been dry underwent little change as regards rainfall through May and June; the temperature during the latter month being far above normal. Under these conditions spring sowings came up badly, of weak and unequal growth, and the result was a crop very short in the straw. July, though very warm, brought with it a sufficiently copious rainfall, which, though in many parts of the country it only came down in showers, considerably improved the crops. The long drought of the early summer had a very unfavourable influence on the yield of grass.

Harvesting began at the end of July and was carried on under favourable conditions throughout August.

Plant
diseases.

Plant diseases are only mentioned in the reports from Odense, Aarhus, Hjørring, and Ringkjøbing Amts. In some places the wheat was affected with fungus, and in Hjørring Amt the potato disease made its appearance. Roots in several parts of the country suffered from mildew. Attacks of insects are not much spoken of. At some places in the Copenhagen districts the larva of the cockchafer did a good deal of damage, and root crops suffered from the same cause in the neighbourhood of Svendborg and Aarhus.

Taking the various crops separately:—

Wheat.

Wheat may be said to have given a middling yield of very good quality.

Rye.

Rye a very good yield both in quantity and quality.

Barley.

Barley gave only a very poor yield as regards quantity, whilst the quality may be put down as middling good.

Oats.

Oats likewise gave a very indifferent return, the quantity much under middling and quality only about middling; it was better in Jutland than in the islands.

* Hósten, Danmark, Aaret, 1893. (May, 1894.)

Leguminous plants gave a poor yield, considerably under middling in quantity and barely a middling yield in quality. Leguminous plants.

Buckwheat gave a middling yield. Buckwheat.

Potatoes gave a very good return both in bulk and quality, and owing to the dry summer the disease only appeared in a few places. Potatoes.

Beets are characterised as good, occasionally as very good. Beets.

Other roots gave only a middling yield.

Hay, both from permanent pastures and artificial grasses, turned out very badly as regards quantity, while the quality is said to have been satisfactory. Hay.

The following statement shows the yield of the various crops in 1893 :— Yield and value of harvest.

Crops.		Quantity.	Value.	Percentages.
			£	
Wheat	Bushels ..	4,509,548	720,977	4·91
Rye	" ..	18,522,633	2,576,638	17·54
Barley	" ..	17,511,036	2,398,768	16·32
Oats	" ..	26,426,484	2,908,395	19·79
Buckwheat	" ..	874,499	115,026	0·78
Beans and peas and other leguminous plants	" ..	625,020	108,512	0·74
Fodder	" ..	8,773,787	1,048,508	7·14
Potatoes	" ..	20,693,364	1,032,618	7·03
Other roots	" ..	80,514,693	1,112,573	7·57
Colza	" ..	26,132	6,841	0·05
Clover	Lasts of 1,100 lbs.	627,569	1,180,555	8·03
Hay	Lasts of 1,100 lbs.	926,856	1,484,495	10·10
Total	..	..	14,693,906	100·00

The gross value of the harvest for the whole country was thus 14,693,906*l.*, being a decrease of about 3,000,000*l.* compared with 1892, or about 18·6 per cent. This is caused to a great extent by a falling-off in quantity, for while prices for some produce have been lower, in other cases they have been somewhat higher; compared with the average for the previous 5 years the value in 1893 shows a decrease of 2,200,000*l.* or 13·3 per cent.

The average yield in value per tonder of land ($1\frac{1}{4}$ acre) was as follows :—

	1893.	1892.	Average, 5 Years.
	Kroner.	Kroner.	Kroner.
Whole country.. ..	83	103	97
Islands	95	126	117
Jutland	75	84	82

Difficulties
affecting
agriculture.

In a general review* of Danish agriculture in 1893, M. Lacour, in his annual report, refers to the universal depression and the increasing difficulties which threaten this industry; among these are instanced the rapidly growing competition of Australia in the English butter market, low prices for produce, isolated cases of disease among cattle, of themselves causing only slight losses, but gaining importance owing to prohibitive measures adopted in countries which afforded the best outlet, stagnation of trade in general, and diminished consumption of farm produce consequent thereon. On the other hand it is shown that things have not been better in other countries, and that for an important item in the Danish exports, viz., pork, good prices were obtained.

Cattle and meat gave very poor returns, the English coal strike being instanced as one of the causes. Stock had to be sold at any price owing to short supplies of fodder, while at the same time imports to the English market from Australia, La Plata, &c., amounted to 4,000,000 carcasses, a trade unknown 13 years ago. Owing to prohibitive measures adopted in neighbouring countries the export of fresh meat had to be resorted to, and slaughteries under the supervision of Government Inspectors were established in Copenhagen, Esbjerg, and Aalborg, but owing to the meat thus exported not always being in the best condition, results obtained did not answer expectations. Many old stock-raising farms are said to have gone over to dairying.

Horses.

The decline in demand for horses from abroad, concurrently with increased production and scanty supplies of fodder, caused a fall in prices. The imports of light horses from Russia rose considerably; 10,800 horses were exported from Denmark in 1893, and about 5,800 imported.

Pigs.

Pigs presented an exception to the general depression, prices being higher than in 1892, which was considered a good year, especially in the trade with England.

Dairies.

Dairy farming had to encounter many difficulties, not so much from short winter fodder, as stocks remaining over from the previous year were ample, but owing to ice obstructions which caused considerable uncertainty in sales.

The short supply of grass in the dry summer caused a falling-off in the yield of milk, and the low prices ruling from December to July when milk is most abundant were far from being made up by the better quotations during the remaining months of the year.

Decline of
area under
wheat.

The cultivation of wheat shows a considerable decline, not only have the imports of this cereal increased, but the surplus export of flour has gone down to under one-seventh of what it was 10 years ago; the amount sent abroad in the eighties being often over 100,000,000 Danish pund. This is explained by the fact that Danish millers are unable to find an outlet for one-half of what they did formerly, exports to the English market having virtually ceased owing to American, German, and French competition. The same is the case with Sweden owing to the duty on flour levied in

* "Tidsskrift for Landøkonomi." J. C. Lacour. 1894.

that country. At the same time the imports into Denmark of foreign flour have risen to 17,000,000 pund, against an average for the last 10 years of 7,000,000 pund.

The large imports of Black Sea barley are referred to as being likely to exercise a serious effect, should it find its way to the breweries which have hitherto been the best customers for the home-grown cereal. Increased imports of Black Sea barley.

The largest imports of foreign grain are under maize, of which over 2,860,000 bushels were imported, of this, 1,500,000 bushels went to the distilleries.

During the autumn and winter considerable shipments of pressed hay and straw were exported by way of Esbjerg at good prices.

Exports of cattle, sheep, and swine all show a falling-off, but in the case of the last the decrease was more than made up by the large exports of bacon, bringing up the total to 200,000 head of swine, or more than double the total for the foregoing 5 years. Exports of live-stock. Bacon.

The surplus exports of butter also show a considerable increase of over 16,500,000 lbs. (avoir.) more than the average for the previous 5 years, and 2,970,000 lbs. more than in 1892. Butter.

The export of eggs, though larger than the average for the 5 years' period, was 1,300,000 scores less than the year before. Eggs.

Coming to the balance-sheet of the year, M. Lacour shows that while Denmark has expended 350,000*l.* to 400,000*l.* less for imported corn and feeding stuffs, animal produce has brought into the country nearly 1,000,000*l.* more than the average. The net or surplus income of the country thus increased from 4,328,000*l.* to 5,705,000*l.*, or about 1,377,000*l.* This sum representing profits from exports is about the same as in the good years between 1870 and 1880. Turning to profits from agriculture generally which do not depend entirely on exports, but on sales for home consumption, it is shown that owing to falling prices the farmers' profits were less than in the previous year. Sales for the home market are estimated to be about three to four times the amount of the exports of an average year or represent a value of about 16,556,000*l.*, and taking prices at about 15 per cent. lower than the average for the last 5 years, their supplies to the home trade will have brought the farmer in 45,000,000 kroner (2,500,000*l.*) less than the average, and deducting from this figure the surplus exports* amounting to 25,000,000 kroner (about 1,389,000*l.*) the year shows a deficit of 20,000,000 kroner (about 1,111,000*l.*). Profits and loss.

A noticeable feature in the report is a partial tendency to migrate back from the towns to the country, and the more abundant supply of hands thus made available is mentioned as one of the bright spots of the year. Labour.

The report from Funen says:—"Wages for unskilled labour, male and female, have fallen considerably, but have not undergone any change for the more efficient hands who, however, no longer appear to evince any desire to migrate; they seem at last to

* Surplus exports, *i.e.*, exports less imports.

recognise that the limits of concession have been reached, and no advantage is to be gained by seeking other situations."

Artificial
fertilisers.

Artificial fertilisers were used to a less extent than in the previous year. The imports were in 1891-92, 83,160,000 lbs.; 1892-93, 72,820,000 lbs., besides 1,980,000 lbs. of phosphate powder. The use of superphosphates has slightly declined, amounting only to 61 per cent. of the whole quantity of fertilisers employed against 81 per cent. in the previous year.

Implements
and
machinery.

Owing to the expected short supply of manual labour, a larger number of reapers, binders, and stacking machines were purchased during the year.

Experiments under State patronage were made with petroleum motors for thrashing machines, and in various parts of the country trials took place with the double plough which has recently attracted attention owing to its greater labour-saving qualities coupled with better work turned out.

Plant culture.

Great care continued to be taken in the further development of plant culture, and its importance is shown by the fact that the annual crop of barley represents a value of not much under 4,000,000*l.* Results of much practical use have been obtained by the experiments of M. Sónner with malting barley conducted over a period of 10 years, and supported by an annual Government grant. Increased attention has been paid to the Prentice and Gold Thorpe varieties.

Sugar-beet.

The cultivation of the sugar-beet has been extended in the islands owing to the larger profits derived from this crop compared with corn, and the improvement not unfrequently derived from it by the soil. The sugar-beet area has at the same time largely increased, and a movement is on foot for the erection of starch factories.

The grant for the improvement of domestic animals was increased from 50 kroner to 125,000 kroner, of which 40,000 kroner were for horses, 60,000 kroner for cattle, 10,000 kroner for consulting experts, and 15,000 kroner for other purposes.

A further annual grant of 50,000 kroner for 5 years was made to assist farmers in combating tuberculosis in horned cattle.

Dairy
instruction.

The courses for dairy instruction have been well resorted to by men and women. Travelling instructors have been engaged to act at vacant posts when necessary.

The Agricultural Society has also undertaken to supply dairy hands to its members who on account of foot-and-mouth disease are in need of extra assistance, their delivery of milk to the co-operative dairies being stopped.

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1894.
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Nº 1373.

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AND FINANCE.

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REPORT FOR THE YEAR 1893

ON THE

TRADE OF SANTO DOMINGO.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1240.

Presented to both Houses of Parliament by Command of Her Majesty,
MAY, 1894.

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1303. Buenos Ayres	½d.	1364. Callao	1d.
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Reference to previous Report, Annual Series No. 1240

DOMINICAN REPUBLIC.

SANTO DOMINGO.

Acting Vice-Consul Leon to the Earl of Kimberley.

My Lord, *Santo Domingo, April 2, 1894.*
I HAVE the honour to enclose Summary of Import and
Export Trade of the Ports of this Consular District for 1893.

I have, &c.
(Signed) A. C. LEON.

*Report on the Trade and Commerce of the Consular District of
Santo Domingo for the Year 1893.*

ABSTRACT of Contents.

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Difficulty in procuring reliable material	1
St. Domingo Improvement Company	1
Exchange	2
Railway	2
Shipping returns	2
Exports	3
Imports	4

The financial year of this Republic counts from March 1, hence *Review.*
the difficulties in procuring reliable data to form a report before
the end of said month.

The principal feature to be considered during the year, from a
commercial point of view, is certainly the transfer of the Westen-
dorp and Company loan (Dutch syndicate) to an American Com-
pany under the denomination of the "St. Domingo Improvement
Company." The revenue of the whole Republic may be said to be
not only mortgaged to this Company, but under their immediate
control, and to that effect their employees have the right of, and
do exercise a direct fiscalisation on the custom authorities.

The result in figures has undoubtedly been good, for the *Statistics.*
general management of customs has been considerably improved,
albeit that the expectation of a large sugar crop caused the
(1760)

importation to be larger than usual during October and November, and that some of our leading merchants imagining that the United States Government would shortly denounce the reciprocity treaty, forced a large importation of goods so as to benefit by the existing advantages. The revenues having reached thereby the unparalleled figure of 2,137,879 dol., exclusive of harbour dues.

Returns.

Glancing at the annexed tables, any one might count the Republic, in the presence of such figures, among the thriving countries; but a good deal must be taken off, first because the two principal articles of export, sugar and tobacco, with very rare exceptions, are in one way or the other liened by advances made on their cultivation, the former by the German markets in Hamburg and Bremen, and the latter by American capitalists. Adding to this circumstance the no less disastrous one that Mexican silver is current at par in virtue of an old decree of Government, and that in consequence the exchange has fluctuated from 50 per cent. to 85 per cent., it may be easily inferred that commerce and agriculture are both going through a trying epoch.

Convention.

Now it seems that a convention is about to be closed with the Improvement Company, with the view to establish gold standard, taking the New York market as basis, and allowing a certain margin for financing; the whole system has to be altered, and it is feared that the new one may occasion serious disturbance in business.

It is satisfactory to report that the English Railroad from Sanchez (Bay of Samana) is doing well, and that by a new combination it is being extended to San Francisco de Macoris, and will be branched off to Moca, embracing on their way the most productive region of the Cibao.

Annex A.—RETURN of all Shipping at the Port of Santo Domingo during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.*	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	18	2,665	6	7,846	24	10,511
Other nations ...	65	27,710	103	64,311	168	92,021
Total ...	83	30,275	109	72,157	192	102,532
„ for the year preceding ...	124	17,832	103	111,638	227	129,470

* It must be observed that tonnage dues on steamers are only payable on the number of tons of cargo brought and of cargo carried away; one of the German boats, for instance, of 2,180 tons brings only 60 tons cargo and carries nothing, is only liable for 60 tons dues.

SANTO DOMINGO.

3

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	18	2,665	6	7,846	24	10,511
Other nations ...	64	27,432	103	64,311	167	91,743
Total	82	30,097	109	72,157	191	102,254
„ for the year preceding ...	121	17,055	103	11,638	224	123,622

NOTE.—Items taken from March 1, 1893, to March 1, 1894.

Annex B.—RETURN of Principal Articles of Export from Santo Domingo City and other Ports of this Consular District during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Resin	Quintals..	43	£ ..	79	£ ..
Orange peel..	„ ..	68	„ ..	12	„ ..
Oranges	Barrels ..	20	„ ..	..	„ ..
Turtle-shell..	„ ..	426	„ ..	424	„ ..
Confectionery	„ ..	142	„ ..	..	„ ..
Cedar	Feet ..	315	„ ..	..	„ ..
Oak	„ ..	250	„ ..	..	„ ..
Mangrove bark	Quintals..	647	„ ..	2,800	„ ..
Divi-divi	Tons ..	352	„ ..	8,236	„ ..
Starch	Barrels ..	46,677	„ ..	..	„ ..
Old copper	lbs. ..	2,095	„ ..	..	„ ..
Cattle	Head ..	1,772	„ ..	47	„ ..
Molasses	Gallons ..	8,470	„ ..	..	„ ..
Chocolate	Lbs. ..	1,120	„ ..	..	„ ..
Horns	„ ..	1,700	„ ..	..	„ ..
Wax	„ ..	22,375	„ ..	51,400	„ ..
Bay rum	Gallons ..	2,190	„ ..	..	„ ..
Fustic	Tons ..	1,450	„ ..	149	„ ..
Lignum vitæ ..	„ ..	2,899	„ ..	840	„ ..
Cocanuts	„ ..	12,497	„ ..	..	„ ..
Yellow satin wood	Feet ..	28,000	„ ..	..	„ ..
Hides	„ ..	26,029	„ ..	8,124	„ ..
Goat-skins	„ ..	10,207	„ ..	..	„ ..
Logwood	Tons ..	18,597	„ ..	590	„ ..
Rum	Gallons ..	41,243	„ ..	28,368	„ ..
Coffee	Quintals..	31,140	„ ..	4,063	„ ..
Cocoa	„ ..	41,546	„ ..	1,365	„ ..
Tobacco	„ ..	164,208	„ ..	6,700	„ ..
Honey	Gallons ..	103,473	„ ..	37,400	„ ..
Sugar	Quintals..	688,334	„ ..	236,115	„ ..
Logs, mahogany	Feet ..	1,042,945	„ ..	223,000	„ ..
Crutch, mahogany	„ ..	104,651	„ ..	..	„ ..
Lancewood spars	„ ..	622,127	„ ..	312,000	„ ..
Total	..	..	405,746	..	153,773
Duties	..	..	38,500	..	..*
Total	..	..	444,246	..	..

* Duties paid.

Place.	Value.		Duties.	
	Dollars	c.	Dollars	c.
City	1,029,145	57	65,010	17
Macoris	1,589,943	0	112,145	42
Sanchez	135,945	95	94,741	21
Samana	46,564	99	5,332	57
Azua	223,633	79	9,611	69
Barahona	17,859	10	1,727	50
Total	3,043,092	40	288,568	56

NOTE.—Including tobacco crop from Northern District.

Annex C.—RETURN of Values Imported at the Ports of this
Consular Jurisdiction during the Year 1893.

Description.	Ports.	Import Duties.	Value.	
			1893.	1892.
		Dollars.	Dollars.	£
Cotton goods	City	520,547	1,253,195	..
German, English, and American provi- sions and Paris articles	Sanchez	211,059	322,795	..
	Macoris	55,419	454,671	..
	Samana	31,902	44,695	..
	Azua	16,370	26,376	..
	Barahona*	..	..	..
Total .. .. .	.. .. .	..	2,101,732	..
Duties .. .. .	.. .. .	..	835,297	..
Declared value .. .. .	.. .. .	..	2,937,029	..
Exchange at about 7·50 Mexican dollars per 1l.		..	391,604l.	230,990

* Not opened to import.

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ECUADOR.

REPORT FOR THE YEAR 1893
ON THE
TRADE OF GUAYAQUIL.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1171.

Presented to both Houses of Parliament by Command of Her Majesty,
MAY, 1894.

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1284. Canton	1d.	1343. Saigon.. ..	1½d.
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1286. Warsaw	½d.	1345. Galatz.. ..	1½d.
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1292. Trieste	1½d.	1351. Santiago	1d.
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ECUADOR.

GUAYAQUIL.

Consul Chambers to the Earl of Kimberley.

My Lord,

Guayaquil, March 3, 1894.

I HAVE the honour to forward to your Lordship herewith my Report on the Trade and Commerce of Ecuador, through the port of Guayaquil, for the year 1893.

I have, &c.

(Signed) GEO. CHAMBERS.

Report on the Trade and Commerce of Ecuador for the Year 1893.

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Imports.

Until the Finance Minister presents his biennial budget at the session of Congress this year, it will be impossible to obtain reliable data concerning the nature and value of the imports to this country during 1893.

Notwithstanding that in consequence of the unprecedented rise in exchange on June 30 a large number of orders on England and elsewhere were cancelled, and subsequent requisitions greatly curtailed, there has been a marked improvement in the import trade during the past year.

Orders on England cancelled, due to high exchange.

Exports.

The usual list of exports from Guayaquil for the years 1892-93 is herewith appended (vide annex A), as also a list showing the total quantities and relative value of the principal exports from the whole of Ecuador:—

Annex B. An examination of the former will show the great increase of exports during 1893 as compared with 1892; the difference in value being about 15½ per cent. Nearly every important product shows a large increase on the quantity exported the year previous, with the exception of indiarubber.

Increase of exports.

The trade in this article is slowly declining, and the cause of it is the reckless manner in which whole groves of these valuable trees are cut down, no future supply being guaranteed by the planting of young saplings as in other rubber-producing countries.

Indiarubber trade.

The market prices of export produce are referred to generally under the headings of cocoa, coffee, &c., q.v.

Market prices.

Imported articles, and principally those of daily consumption, have advanced in price fully 30 per cent., and in some instances 50 per cent., the retail dealers having seized upon the pretext of a high exchange, coupled with the 10 per cent. surtax on import dues, to effect this.

The President has appointed a committee to revise and correct the existing custom-house tariff, which requires alteration, as the custom-house authorities have discovered that many articles are considerably overtaxed, whereas the duties on others should be remitted, moreover, sufficient revenue is not derived from this source to meet the increased requirements of the Government administration.

Committee to revise custom-house tariff.

The "Bank of Ecuador" paid a dividend of 15 per cent. for the year, besides applying 100,000 sucres, approximately 12,000£, or say 6 per cent. on its capital, to the reserve fund, and also increased the anticipated dividend fund, which now amounts to 267,890 sucres (31,703£), or nearly 17 per cent. on the subscribed capital.

Banks.

The value of bank notes in circulation at the end of the year amounted to 2,784,134 sucres (329,483£), and the Government debt to the bank was 1,306,279 sucres 92 c.

A very large increase in the amounts deposited in foreign countries for exchange purposes is noticeable, sc., from 1,610,974 sucres (211,440*l.*) the year before, to 2,138,692 sucres (253,100*l.*), and this is further augmented by a gold reserve in Ecuador of 40,000*l.* in whole and half sovereigns (valued at 360,000 sucres) which were imported towards the close of the year in anticipation of the possible adoption of the bank's proposal for a gold standard (v. Exchange).

The "Banco Internacional" declared a dividend of 6 per cent. on June 30 for the first half year, and on December 30 a second dividend of 9 per cent., making in all 15 per cent. for the year. The circulation amounted to 1,286,037 sucres (152,196*l.*), and the silver reserve to 511,131 sucres (60,488*l.*).

The "Banco de Credito Hipotecario" (mortgage bank) declared a dividend of 18 per cent. during the year, 6 per cent. of which was advanced in June. The advances on mortgage amount to 2,259,754 sucres 60 c. (267,427*l.*). The nominal capital of this bank is 400,000 sucres, of which 340,000 sucres have been paid up, and the reserve fund on December 31 was 113,694 sucres 42 c., which is an increase of 9,186 sucres 40 c. over 1892.

Exchange.

In calculating the average exchange for the past year I have taken the rates at usance on London, as being more nearly applicable to the majority of exchange transactions with England than short sight rates.

Usance on London is 90 days, and on New York 60 days. The established difference in exchange between these terms and sight is $\frac{1}{2}$ per cent. per mensem.

Commercial houses sell bills of exchange ordinarily at lower rates than those quoted by the banks. They are usually $\frac{1}{2}$ per cent. less for drafts on London, and 1 per cent. less for drafts on New York. The bank purchasing rate is about $3\frac{1}{2}$ per cent. lower than quotations or selling prices. The banks refuse to sell bills on the day a mail steamer sails, in consequence of which the merchant has then the option, which he seldom foregoes, of charging full bank rates.

The average value of the sucre for the year was 28 $\frac{3}{8}$ *d.*, a decline of 3 $\frac{1}{8}$ *d.* from 1892.

Nowhere has the gradual depreciation of silver been better illustrated than in this country, as the following average value of the sucre for the past 3 years will show:—

Year.							Average Value.
1891	..	..	..	..	..	..	<i>d.</i>
1892	..	..	..	..	..	..	35 $\frac{3}{8}$
1893	..	..	..	..	..	..	31 $\frac{1}{2}$
							28 $\frac{3}{8}$

The monthly average rates at usance for 1893 were as follows :—

MONTHLY Average Rates of Exchange and Equivalent Value of the Sucre.

Month.	Per Cent.	Equivalent per Sucre.
		d.
January	65½	29
February	63½	29½
March	61½	29½
April	57	30½
May.. .. .	55½	30½
June	61	29½
July.. .. .	77½	27
August	77½	27
September	76½	27½
October	74½	27½
November	78½	26½
December	78½	26½

The highest rate was reached on June 30, when, owing to the remarkable depreciation of silver, exchange advanced 17 per cent. From that date to the end of October it fluctuated somewhat, although the same rate was frequently touched. During the last 2 months of the year it remained fixed at the rate mentioned (78½ per cent.) notwithstanding the fact that on many occasions this quotation was considerably below the relative intrinsic value of the sucre.

The lowest rate was attained on May 8, and upheld for a fortnight. During this term the sucre was valued at 31½d.

On a petition from the merchants of Guayaquil, and after having consulted the directors of the Bank of Ecuador and the Banco Internacional, his Excellency the President appointed a committee to enquire into and report upon the feasibility of adopting a gold currency. As a result of their investigations, the committee forwarded three projects for the purpose, one of which, drawn up by the manager of the Bank of Ecuador, was specially recommended by them, as also by the Guayaquil Chamber of Commerce, to whom it had been submitted. The tenor of the bank's proposal was as follows:—The bank offered to import 250,000*l.* in gold before December 31, 1893, and was to be reimbursed for all losses arising from exchange, freight, insurance, and interest by Government in the sum of 300,000 sucres (37,500*l.*). It undertook to have re-coined all the money that might be withdrawn from circulation, including the 300,000 sucres it should receive from the Treasury for account and risk of the country, and offered to open an account against Government for every such expense, bearing interest at the rate of 9 per cent. per annum. This account should be liquidated on December 31, 1894, and any

balance on that date transferred to the Internal Debt account. These terms, however, were conditional upon a New Monetary Law being passed by Congress upon the following basis :—

Basis for a
New Monetary
Law.

There shall be 1 sucre, 5 sucre, and 10 sucre gold pieces of standard fineness, weighing 1 gramme, 5 grammes, and 10 grammes respectively. Fineness standard, nine-tenths.

There shall be 5 c., 10 c., and 20 c.* silver pieces, weighing 1.250 grammes, 2.500 grammes, and 5 grammes, according to value, and of standard (nine-tenths) fineness.

There shall also be a 5 c. nickel coin, and 2 c. and 1 c. pieces in bronze.

The size, die, &c., of the gold coins to be determined by the Executive. All other coins to remain as at present in circulation.

The importation of all kinds of silver coin, except by Government, shall be prohibited, and, until the national gold coin can be procured, the English sovereign and half-sovereign shall be adopted, and circulate for the respective values of 8 sucres and 4 sucres.

It was further stipulated that all the 1 sucre silver pieces in circulation should be withdrawn within 3 months from the date of the passing of a New Monetary Law.

The foregoing proposal duly appeared in the official gazette, and was roughly criticised by the independent Press, since which nothing further has been heard of it. It is understood that if time will allow it will be laid before Congress this year.

Other
proposals for
a gold
currency.

The other two projects, one of which proposed the circulation of the sovereign at par (5 sucres), provided for extra import and export dues to defray the cost of conversion, and on this account were distasteful to the public at large.

Shipping.

A return of all shipping entered and cleared from the port of Guayaquil during 1893 is herewith appended, vide Annex C.

The lines of British steamers that connect with this port are as follows :—

British
shipping.

The Pacific Steam Navigation Company, mail carriers, from Valparaiso to Panama, that make four calls per month, two in going north to Panama, and two in returning south to Callao and Valparaiso. They alternate these calls with those of the Chilean "Compañía Sud-Americano de Vapores," who are likewise mail

Mail service.

carriers, by which arrangement two mail steamers arrive here each week, ordinarily one from Panama on a Monday, and another from the south on a Saturday. The Pacific Steam Navigation Company also maintain a coastal service between Guayaquil and Panama, for which they are subsidised. This branch line places all the Ecuadorian and Colombian coast ports in the Pacific, which are not ports of call for the regular mail steamers, in direct communication with Guayaquil. These ports are Ballenita, Cayo, Manta, Bahia, and Esmeraldas in Ecuador, and Tumaco and

Subsidised
coastal
service.

* 100 c. to the gold sucre.

Buenaventura in Colombia. At present the steamer performing this service makes a short trip to and from Esmeraldas, omitting Cayo, in about 9 days, and alternates this with a through trip to and from Panama, calling at all the ports enumerated above, which occupies 3 weeks.

The Greenock Line of steamships, better known as the "Gulf" Line, make occasional calls at Guayaquil.

The Merchants' Line of steamships, of New York, sailing under the British flag, belonging to Messrs. M. P. Grace, and Co., of London, and Messrs. W. R. Grace and Co., New York, started to run towards the close of the year. It is understood that the steamers of this line will make a monthly voyage from New York to Guayaquil, calling in at Chilean and Peruvian way-ports.

The lines of foreign steamships that connect with this port are:—

The Compañía Sud-Americana de Vapores, a Chilean company, already referred to as being mail carriers, and alternating their voyages with those of the Pacific Steam Navigation Company. Foreign shipping.

The Hamburg-Pacific Dampfschiff's Linie, better known as the "Kirsten" Line of steamships, and the "Kosmos" steamers.

Many of the vessels of the two latter lines, in competition with the Pacific Steam Navigation Company, extended their run to the minor Ecuadorian ports where, owing to a lower freight tariff and other inducements of a like nature, they secured a large share of the export cargo. Competition between British and foreign vessels.

Freights.

Owing to the rise in exchange, the regular steamship lines raised their tariffs 25 per cent., but subsequently this increase was withdrawn from specie shipments, which now go forward at the normal rate.

Owing to the opposition from occasional steamers the old-established lines in accord with the connecting companies, via the Isthmus of Panama, reduced their rates on certain articles such as sugar, ivory-nuts, and tobacco. The through rate of 3*l*. per ton of cocoa and coffee, established in 1891, has continued to work successfully, the merchants and cocoa agents preferring the rapid transit via the Isthmus to the protracted journey via Magellan, in occasional vessels, at a lower rate of freight. The following list of shipments by both routes will demonstrate this:—

TOTAL Shipments of Produce to Europe from Guayaquil by the North and South Routes, and Proportion carried by each Company.

Description.	Cocoa.	Coffee.	Ivory-nuts.	Sugar.
	Bags.	Bags.	Bags.	Bags.
VIÂ ISTHMUS OF PANAMA.				
Compagnie Générale Transatlantique	52,479	1,027	3,604	..
Hamburg-American Steam Packet Company	43,857	2,050	1,923	..
Compañia Trasatlantica de Barcelona	3,022	..	..	..
Royal Mail Steam Packet Company	49,250	2,885	1,891	370
Total	148,608	5,962	7,418	370
VIÂ THE STRAITS OF MAGELLAN.				
Compagnie Maritime du Pacifique	88,714	1,473	9,640	..
"Kosmos" line	1,703	4,855	20,272	..
"Kirsten" line	..	..	10,730	..
Sailing vessels—				
" Fides "	}	..	11,500	..
" Iris "				
" Else "				
Total	90,417	6,328	52,142	..

It will be noticed, however, that a large quantity of cocoa, &c., was taken viâ Magellan by the steamers of the Compagnie Maritime du Pacifique, and of the "Kosmos" line, but this is explained by the fact that the sole shippers by these steamers are likewise their agents here, and have a contract with the company by which a conventional rate of freight is enjoyed.

Eleven steamers of the former line called in here and were loaded by their agent during 1893, the smallest quantity of cocoa taken forward being 138 tons per steamship "Atlantique," on March 1, 1893. Several vessels loaded over 600 tons of cocoa apiece, to say nothing of the coffee and ivory-nuts shipped by them, they were:—

Steamship.	Date.	Cocoa.
		Tons.
"Ville de Belfort"	May 8, 1893	606
"Pacifique"	May 31, 1893	1,019
"Perou"	July 8, 1893	1,262
"Tropique"	Aug. 5, 1893	780

It will also be observed that by far the larger quantity of Shippers ivory-nuts went viâ Magellan, and the reason for this is not a question of freight, the difference being only 2s. per ton, but of packing. Owing to the necessary transshipments of this article on the route viâ Panama, it cannot be conveniently handled except in sacks, whereas in the steamers viâ Magellan it is taken in bulk, which saves the shippers an outlay of about 14s. 6d. per ton. prefer sending ivory-nuts by the Straits.

The only men-of-war that called in at Guayaquil during the Men-of-war. past year were the German corvette "Marie" which arrived in August, and the British cruiser "Hyacinth," Commander May, C.B., which came in October.

Cayo is situated in the north-east of a large bay lying between Canoa Point to the north and Salango Island to the southward, and is 14 miles to the north of the latter island. It is an open roadstead, but good anchorage may be found about one-third of a mile from shore, in $5\frac{1}{2}$ fathoms, with Daphne Rock midway between Cayo Island and the mainland. New port of Cayo.

During the winter season heavy rollers with a long swell are experienced from the westward, rendering communication with the shore difficult and at times impossible.

The shipment and discharge of cargo is performed by canoes, and owing to the heavy surf on shore it is both difficult and dangerous.

There are only four houses in the place, and these are severally occupied by the captain of the port and launchmen. About 1 mile inland there is a posada or inn for the accommodation of travellers from Jipijapa, of which important town Cayo may be considered the seaport. The journey from one place to the other is made in $1\frac{1}{2}$ hours on horse-back. The principal shipments from Cayo are hats, ivory-nuts, hides, and small quantities of coffee, and rubber, and these will no doubt, in time, be of much more importance than at present.

The value of the exports from Cayo during 1893 amounted to 11,800*l*.

Crops.

The yield of the various export crops during 1893, and of cocoa in particular, was eminently satisfactory, whereas the harvest of certain produce for home consumption, such as potatoes and Indian corn, was uncommonly meagre. Export crops satisfactory.

The latter was especially the case in the provinces of Cañar and Azuay, where owing to the failure of the corn crops a famine ensued, which proved scarce less severe than that experienced in the same districts in 1882. While in the year mentioned the cause was an excessive drought, in the present instance the failure was due to continued frosts. Several attempts were made to raise the corn, but in the majority of cases the young plants became frost-bitten, and it was not until the year was well advanced and time before the ensuing winter too short to allow a crop to mature that they would thrive. Famine in Cañar and Azuay.

The principal sufferers were the numerous small agriculturists who depend almost exclusively upon the corn crops for their sustenance. About one-fifth of the crops was garnered on the few large estates in these provinces, but it was insufficient to avert the evil that threatened, and finally supervened. Supplies were sent by the Government from both Quito and Guayaquil, and many private persons also contributed to allay the distress in the famine-stricken districts.

Cocoa.

The cocoa crop for the year 1893 is the largest on record, but the increase over 1892 has not been evenly distributed over the various cocoa producing districts. The following figures will serve to show the origin of the excess :—

RECEIPTS at Guayaquil during the Years 1892-93.

					Quantity.	
					1892.	1893.
					Tons.	Tons.
Arriba	..	..	..	..	10,966	13,093
Machala	..	..	..	..	2,232	3,077
Balao	..	..	..	..	1,752	1,782
Total	..	..	..	..	14,950	17,952

From the foregoing it will be seen that nearly the whole of the increase is due to the Arriba or up-river crops, owing doubtlessly to the extensive increase in the cultivation of the cocoa tree, as mentioned in former reports, and to exceedingly favourable climatical causes.

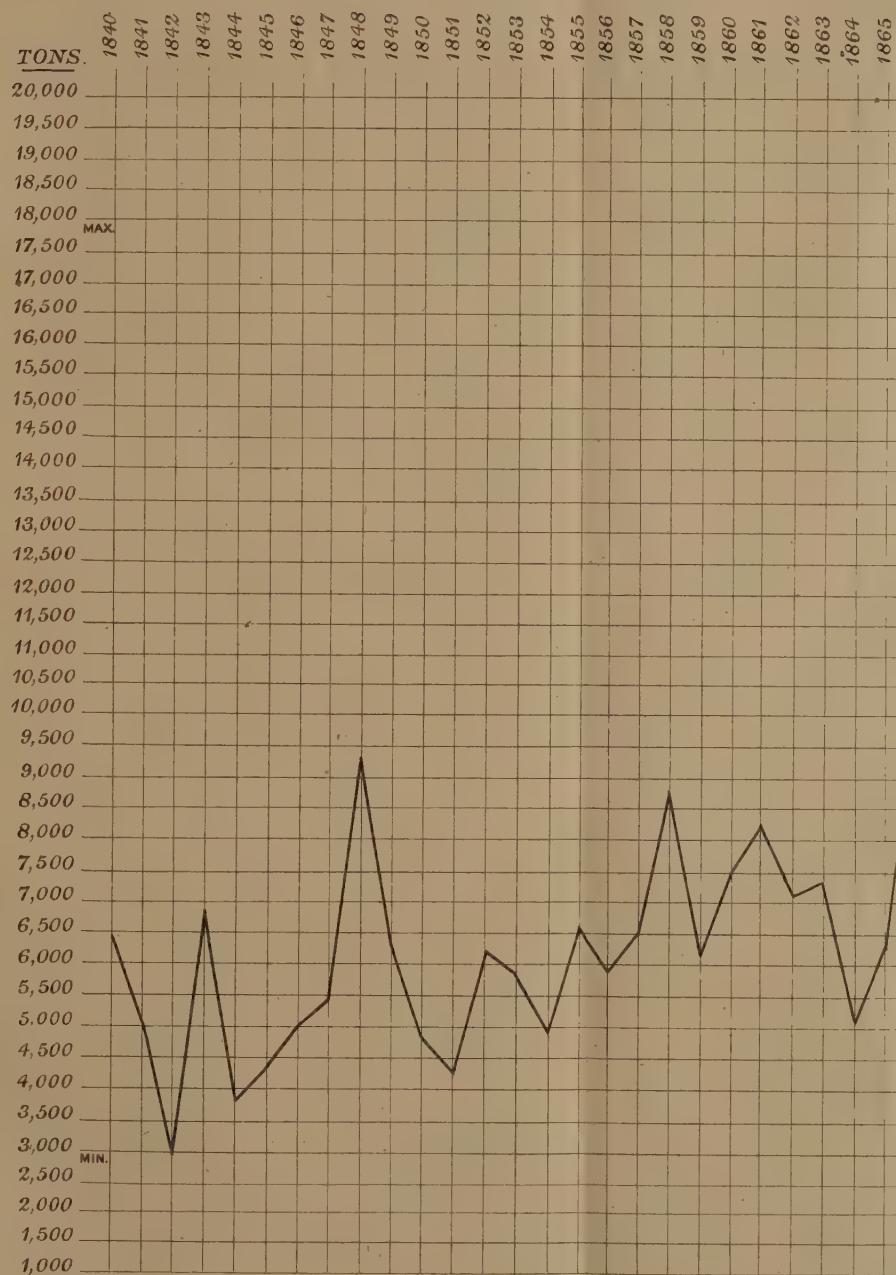
Machala was fairly abundant if we take into consideration the permanent injury done to many plantations by flood the year before. But Balao, though showing an insignificant increase upon 1891-92, fell considerably short of the average for former years.

Variation of
market prices
of cocoa.

Prices were well maintained despite comparatively high rates of exchange. Commencing in January at a rate of about 3*l.* 7*s.* per cwt., they gradually rose to 3*l.* 12*s.* 6*d.* per cwt. in March, and in April reached 4*l.* 4*s.* per cwt., after which they began to decline, falling to 3*l.* 10*s.* 6*d.* per cwt. in July, and finally as low as 3*l.* 3*s.* 10*d.* per cwt. in August, at which rate they continued with very little variation to the end of the year. The mean average value for 1893 is slightly under 3*l.* 7*s.* 3*d.* per cwt.

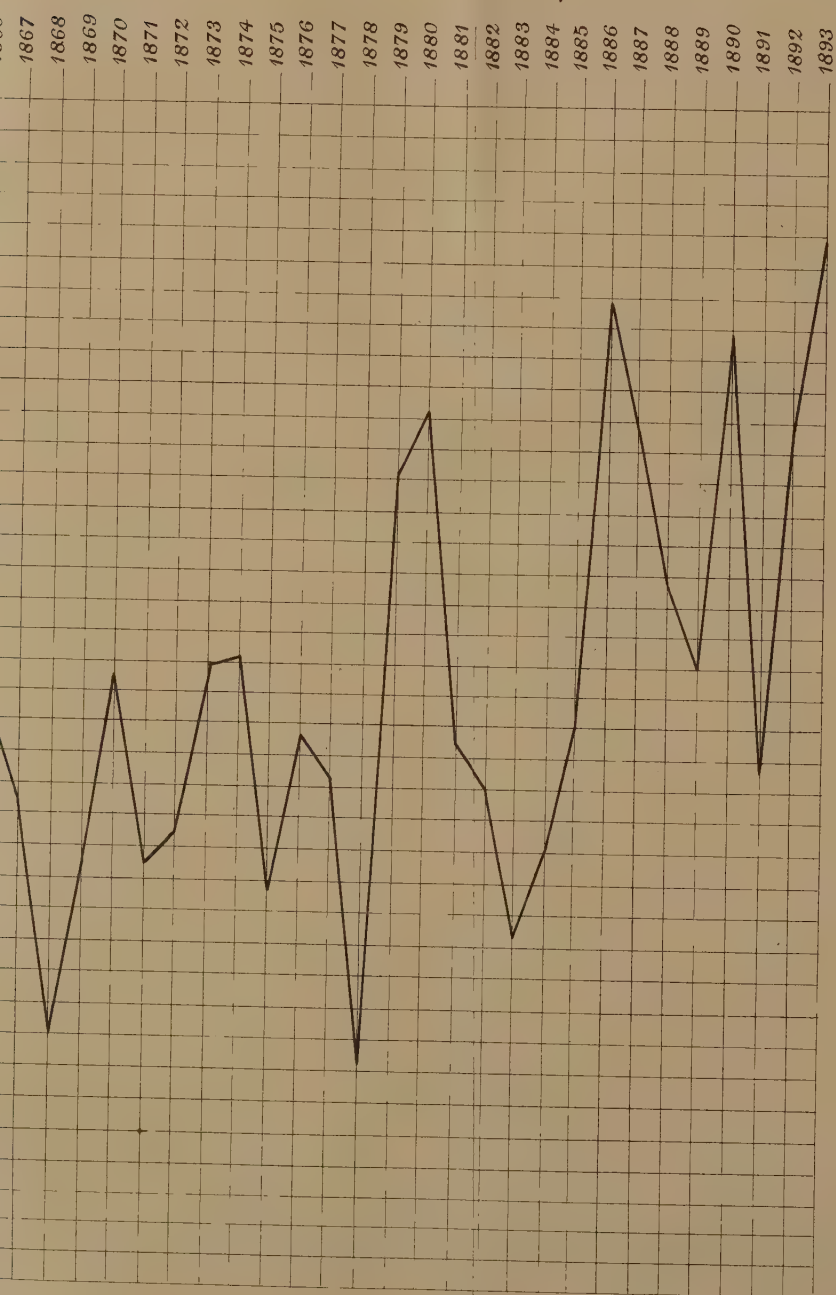
As the greater part of the cocoa crop finds its way to Guayaquil, whence it is shipped by steamer for Europe and the United States, the receipts at this port may be taken as fair standards of the

DIAGRAM ILLUSTRATIVE OF THE PROGRESS



c D.

OF COCOA RECEIPTS AT GUAYAQUIL. 1840-93



entire quantity produced throughout the Republic. Upon this basis I have prepared a diagram (Annex D) accompanied by a detailed statement of the quantities received during the past 54 years, vide Annex D2, which will serve to illustrate the very irregular nature of the crops, and at the same time refute the old-time fallacy that a good crop may be expected every fourth year or so.

Beyond climatical causes, no reason whatever can be advanced to explain the variableness of the cocoa harvests. The absence of a few weeks' rain will cause a notable decrease in the yield of an estate; and the same result may be apprehended from a few heavy showers; the young fruit in either case becoming blighted.

Coffee.

The yield in the low-lying districts near the coast was very deficient, but farther inland it proved abundant. The total quantity exported amounted to 1,838 tons, nearly one-third of which was shipped in the husk.

Prices were high throughout the year, and the average quotation may be fixed at 3*l.* 12*s.* 8*d.* per cwt.

As coffee raising from a speculative point of view is as remunerative as cocoa farming, while on the other hand it yields a quicker return, investors are paying greater attention to this branch of agriculture than hitherto, and there was a marked increase in the number of new plantations during last year.

Sugar.

The total output of the sugar mills for 1893 was 5,000 tons, this being a decline of 16½ per cent. on 1892. The decrease is attributable to an exceptionally dry winter which reduced the yield of sap in several important cane-growing districts.

The sugar refiners formed a syndicate, under whose régime local consumers were forced to pay as high as 1*l.* 11*s.* 9*d.* per cwt. equivalent to about 3½*d.* per lb. of white grainy sugar, a rate which though onerous to the poorer classes was, as may be conjectured, highly beneficial to both planters and refiners. The high prices that obtained in Europe and elsewhere, coupled with a prohibitive import duty here (about 1*d.* per lb.), enabled the syndicate to maintain the price above quoted throughout the season. This experience has been sufficient to induce the provision merchants and a large number of consumers to join together for the purpose of presenting to Congress this year a petition praying that the protective duty on sugar be either abolished or reduced.

There had been a surplus for export of nearly 1,000 tons, of which something under 700 tons was exported up to December 30; the balance remains on hand for export during the present year.

The Panama market draws its supply chiefly from Guayaquil,

but, with this exception, nearly all the sugar exported goes direct to Liverpool, where it is in good demand. The grainy, white quality is very suitable for the grocery trade, and fetches a much higher price than raw sugar for refining purposes.

A trial shipment of 30 tons was made to Chile in the month of September, but the experiment has not been since repeated.

Ivory-nuts.

There has been a still further increase in the export of these nuts from Ecuador generally, and to-day the collection of tagua (as they are called) ranks third on the list of Ecuadorian industries.

Prices ruled low throughout the year, and the average selling rate in Guayaquil was 5*s.* 6*d.* per cwt.

Decline of
shipments by
sailing
vessels.

In former years, and up to quite recently, the ivory-nut (misnamed commercially "corozo") was shipped to Europe almost exclusively in sailing vessels, but since the various steamship companies have reduced the rate of freight it now goes chiefly by steamer.

The total quantity of this produce exported from Ecuador during 1893 was 17,222 tons. From Guayaquil the quantity taken by steamers was 4,291 tons, of which only 662 tons went forward by the regular mail steamers (P.S.N.C. and C.S.A. de V.) viâ Panama, the rest having gone forward in bulk viâ the Straits of Magellan (vide "Freights").

The quantity taken by sailing vessels was 1,026 tons.

Rice.

The local crops were very fair indeed, but did not fill the requirements of the country. Most of the imported grain came from Rangoon, and only a few insignificant consignments were received from Peru.

Arnotto.

The vegetable-dye arnotto (the seed of the *bixa orellana*) is included among other products in the present list of exports, owing to an increased demand for this article in Peru, where the *bixa* tree is not so prolific.

Bamboo Canes.

There has been a steady increase in the export of bamboo canes (*cañas de Guayaquil*) to Chile.

Public Works.

Roads.

Repairs to the main road from Bodegas to the capital were attended to in a desultory manner, the most dangerous parts

having been kept in order by the local authorities to prevent it becoming impassable.

The Ibarra-Pailon road was commenced, and altogether 10 miles at the Ibarra end were completed. The road from Loja to Santa Rosa was considerably widened and otherwise improved. Work was continued steadily on the Cuenca-Azoguez highway, and generally a fair share of attention and revenue was devoted to the roads of the interior.

The report of the official receiver of the Duran-Chimbo (or Southern) Railway shows the road and plant to be in a deplorable condition, and a great outlay is required to place the line in a state of efficiency.

According to the report which appeared in the "Diario Oficial," or "Official Gazette," out of 91 kiloms., the whole extension of the line, 11 kiloms. are in a very bad state, and of 50 bridges 47 need immediate attention; the latter have been temporarily repaired to prevent a stoppage of traffic.

Mining.

The work of installation of the Playa de Oro gold placer mines in the province of Esmeraldas was continued throughout 1893, and it is expected that gold will be extracted during the present year.

The remittances to England from the Zaruma Gold Mining Company's works were much smaller than for some years past. The work of exploration was continued with success, as some rich, though very refractory, ore was met with in several places.

During the early part of the year a private speculator undertook to concentrate a quantity of ore that had been extracted from the Pacayurcu gold mine, but, beyond this, work at the mine in question has been at a standstill.

Owing to the great depreciation in the value of silver, the Pillzhum silver mines have been temporarily closed.

Finance.

Cocoa is the mainstay of Ecuadorian finance, as it is of its commercial prosperity, and with the extraordinary export of this produce during 1893, and the attendant increased activity of commerce, there has been a corresponding increment to the public purse.

Taking the foreign debt service as a basis, the income derived from the import dues (one of the principal sources of revenue to the country) was approximately 343,670*l.*, which is distributed as follows :—

Month.						Amount.
						£
January	..	..	..	..	..	23,822
February	..	..	..	..	..	23,179
March	..	..	..	..	..	17,953
April	..	..	..	..	..	22,192
May	..	..	..	..	..	35,944
June	..	..	..	..	..	35,030
July	..	..	..	..	..	31,205
August	..	..	..	..	..	36,481
September	..	..	..	..	..	26,310
October	..	..	..	..	..	26,685
November	..	..	..	..	..	29,045
December	..	..	..	..	..	35,823

It will be impossible to obtain further information regarding the country's finances before the presentation of the budget to Congress in June next.

Foreign debt.

The service of the new External Consolidated Debt has been well attended to during the past year, and the first and second coupons were duly liquidated in London on May 1 and November 1 respectively.

Owing to the higher rate of exchange the second coupon has cost the country 11,939 sucres 89 c., or say 1,413*l.* more than the first, and this was an incentive, though not the principal one, to precipitate the question of a gold currency. With such a standard, upon the basis suggested by the Bank of Ecuador (vide "Exchange"), viz., 8 sucres to the 1*l.* sterling, the deficit on the first coupon would have been only 60*l.* 5*s.*, and on the second 3,132*l.* 10*s.*, or even less, which would have meant a saving of about 1,558*l.* 19*s.*

The great difference in the actual deficits (compare Annexes E and F) is accounted for in the fact that the revenue to pay the first coupon extended over a period of 11 months, whereas that for the service of the second was confined to the regular term of 6 months.

It may be noticed that the land custom-house of Loja has been omitted from the debt service returns annexed. This custom-house yielded only 3 sucres 35 c. during the whole of 1893.

Internal debt.

The contracts made between the Government and the two principal banks of Guayaquil (the Bank of Ecuador and the Banco Internacional) are still in force.

The total value of the Internal Debt on December 30 was 1,877,299 sucres (222,165*l.*), of which 1,306,280 sucres (154,589*l.*) was owing to the Bank of Ecuador, and 571,019 sucres (67,576*l.*) to the Banco Internacional.

**Guayaquil
Municipal
Debt.**

The debt of the Guayaquil municipality to the Banco Hipotecaria at the end of the year amounted to 1,205,013 sucres 37 c. (142,605*l.*), against 1,326,000 sucres (174,038*l.*) at the end of 1892.

Gas Company.

The Guayaquil Gas Company declared a dividend of 10 per cent. for 1893, 4 per cent. of which was advanced in July. The capital of this company is 240,000 sucres, which has been fully paid up. Bonds bearing interest at the rate of 10 per cent. per annum were issued originally for the value of 70,000 sucres, and of these 29,000 sucres worth have been redeemed.

The number of public lamps in Guayaquil exceeds 1,000. Public lamps.

The price of gas is 20 c. per cubic metre, equivalent to about Price of gas.
13s. 4½d. per 1,000 cubic feet.

Annex A.—EXPORTS from Guayaquil for the Years 1892-93.

Articles.	Price.		1892.		Price.	1893.	
	£	s. d.	Quantity.	Value.		Quantity.	Value.
Arnotto ..	..	..	..	£	£	s. d.	£
Bamboo canes ..	Quintal*	..	..	..	1 5 0	92	115
Cinchona bark ..	Thousand	..	..	..	28 10 0	39,000	1,112
Cocoa ..	Quintal	3 0 0	318	954	3 0 0	675	2,025
Coffee ..	"	3 0 0	321,493	964,479	3 0 0	405,000	1,215,000
Cotton ..	"	3 5 0	36,508	118,651	3 5 0	41,177	138,825
Cundurango ..	"	3 0 0	50	150	2 0 0	38	76
Hides, raw ..	"	1 15 0	1,943	3,400	1 5 0	446	558
" tanned ..	"	2 0 0	11,797	23,594	1 10 0	11,486	17,229
India-rubber ..	Each ..	0 9 0	858	161	..	..	..
Ivory-nuts ..	Quintal	5 10 0	4,635	25,493	4 10 0	3,929	17,680
Oreohella weed ..	"	0 6 6	113,185	36,785	0 5 6	138,115	37,981
Pitch, mineral ..	"	1 5 0	444	555	1 5 0	700	875
Sarsaparilla ..	"	1 10 0	195	293	1 5 0	32	40
Specie, gold dust, &c. ..	"	..	..	..	2 5 0	239	538
Straw, hammock ..	Sucres	..	514,411	67,516	..	267,183	31,619
" hats ..	Quintal	6 0 0	360	2,160	6 0 0	379	2,274
Sugar ..	Sucres	..	158,594	20,815	..	114,791	13,585
Sundries ..	Quintal	0 13 0	46,352	30,129	0 12 0	15,306	9,183
Tobacco in leaf ..	Sterling	..	..	60,000	..	..	80,000
	Quintal	..	..	..	2 5 0	69	155
Total ..	..	..	..	1,855,135	..	..	1,568,870

* The quintal, or Spanish cwt. = 100 lbs. avoirdupois.

Annex B.—LIST of the Principal Exports from Ecuador for the Year 1893.

Articles		Quantity.	Total.	Value.
Cocoa	Guayaquil ..	Quintals. 405,000	432,438	£ 1,297,314
	Other ports ..	27,438		
Coffee	Guayaquil ..	41,177	43,985	162,951
	Other ports ..	2,808		
Hides, raw ..	Guayaquil ..	11,486	13,873	20,810
	Other ports ..	2,387		
Rubber	Guayaquil ..	3,929	8,706	39,177
	Other ports ..	4,777		
Ivory-nuts.. ..	Guayaquil ..	138,115	385,775	106,088
	Other ports ..	247,660		
Straw hats ..	Guayaquil ..	Sucres. 114,791	Sucres. 225,394	26,673
	Other ports ..	110,603		
Tobacco leaf ..	Guayaquil ..	Quintals. 69	Quintals. 1,446	2,994
	Other ports ..	1,377		
Total .. ..	.. ..	..	..	1,656,007

Annex C.—RETURN of all Shipping at the Port of Guayaquil during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	4	3,471	81	100,483	85	103,954
Ecuadorian* ..	1,521	23,720	..	..	1,521	23,720
Foreign	15	7,594	86	132,284	101	139,878
Total	1,540	34,785	167	232,767	1,707	267,552

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	3	3,393	81	100,483	84	103,776
Ecuadorian* ..	1,517	22,815	..	..	1,517	22,815
Foreign	15	6,940	86	132,284	101	139,224
Total	1,535	33,048	167	232,767	1,702	265,815

* Under this heading are included the numerous "Balandras" and "Chatas" that carry on the "Servicio de Cabotage," or local coast traffic. Over 600 of these small vessels visit Guayaquil regularly, and altogether give employment to about 2,000 persons. Their average burthen is 15 tons.

Annex D2 (to accompany Diagram).—Cocoa received in
Guayaquil from the Year 1840–93 inclusive.

Year.						Quantity.
						Tons.
1840..	..	..	..	..	..	6,360
1841..	..	..	..	..	..	5,094
1842..	..	..	..	..	..	2,995
1843..	..	..	..	..	..	6,903
1844..	..	..	..	..	..	3,828
1845..	..	..	..	..	..	4,343
1846..	..	..	..	..	..	5,000
1847..	..	..	..	..	..	5,390
1848..	..	..	..	..	..	9,378
1849..	..	..	..	..	..	6,355
1850..	..	..	..	..	..	4,940
1851..	..	..	..	..	..	4,271
1852..	..	..	..	..	..	6,234
1853..	..	..	..	..	..	5,912
1854..	..	..	..	..	..	4,907
1855..	..	..	..	..	..	6,736
1856..	..	..	..	..	..	5,925
1857..	..	..	..	..	..	6,592
1858..	..	..	..	..	..	8,803
1859..	..	..	..	..	..	6,079
1860..	..	..	..	..	..	7,573
1861..	..	..	..	..	..	8,338
1862..	..	..	..	..	..	7,154
1863..	..	..	..	..	..	7,322
1864..	..	..	..	..	..	5,112
1865..	..	..	..	..	..	6,369
1866..	..	..	..	..	..	10,048
1867..	..	..	..	..	..	8,806
1868..	..	..	..	..	..	5,015
1869..	..	..	..	..	..	7,745
1870..	..	..	..	..	..	10,854
1871..	..	..	..	..	..	7,697
1872..	..	..	..	..	..	8,358
1873..	..	..	..	..	..	10,980
1874..	..	..	..	..	..	11,048
1875..	..	..	..	..	..	7,397
1876..	..	..	..	..	..	9,866
1877..	..	..	..	..	..	9,165
1878..	..	..	..	..	..	4,611
1879..	..	..	..	..	..	14,077
1880..	..	..	..	..	..	15,124
1881..	..	..	..	..	..	9,876
1882..	..	..	..	..	..	9,097
1883..	..	..	..	..	..	6,700
1884..	..	..	..	..	..	8,033
1885..	..	..	..	..	..	10,026
1886..	..	..	..	..	..	16,926
1887..	..	..	..	..	..	14,922
1888..	..	..	..	..	..	12,351
1889..	..	..	..	..	..	10,989
1890..	..	..	..	..	..	16,291
1891..	..	..	..	..	..	9,411
1892..	..	..	..	..	..	14,950
1893..	..	..	..	..	..	17,952
Total quantity received during the past 54 years, as above						456,228

NOTE.—From the year 1833–39 inclusive, 31,381 tons of cocoa were received at Guayaquil.

Annex E.—DEBT Service Returns, 1893.—Liquidation of First Coupon of the Foreign Debt.

Custom-houses.	Amount Received in 1892.	November, 1892.	January.	February.	March.	April.	Total.
	Sucres c.	Sucres c.	Sucres c.	Sucres c.	Sucres c.	Sucres c.	Sucres c.
Guayaquil ..	91,036 47	..	15,907 99	14,651 99	11,930 61	14,020 76	146,347 82
Manta ..	873 58	..	107 63	110 10	94 74	..	1,186 5
Bahia ..	733 99	..	38 55	145 61	52 60	40 70*	1,006 45
Esmeraldas ..	259 95	34 81	46 34	111 8	154 63	..	606 81
Tulcan ..	265 32	..	35 49	1 12	36 98	..	338 91
Loja ..	81 94	..	..	..	..	..	31 94
Total ..	93,201 25	34 81	15,484 66	15,066 24	11,669 56	14,061 46	149,517 98

NOTE.—The sum of 149,517 sucres 98 c. realised 18,418*l.* 12*s.* 6*d.*, and the deficit, 331*l.* 7*s.* 6*d.*, was paid out of the public treasury.

* Amount collected during the first fortnight in April.

Annex F.—DEBT Service Returns, 1893.—Liquidation of Second Coupon of the Foreign Debt.

Custom-houses.	April.	May.	June.	July.	August.	September.	October.	Totals.
	Sucres c.	Sucres c.	Sucres c.	Sucres c.	Sucres c.	Sucres c.	Sucres c.	Sucres c.
Guayaquil ..	..	23,040 3	22,403 8	19,432 84	23,355 92	16,960 24	16,980 74	122,172 85
Manta ..	127 18	129 74	135 30	139 65	193 75	84 0	175 40	985 2
Raila ..	74 67*	100 88	85 75	229 15	11 95	19 72	49 80	571 92
Esmeraldas ..	91 12	42 34	134 38	460 7	108 57	12 53	87 66	936 67
Tulcan ..	70 88	50 58	11 2	21 79	42 38	25 5	51 75	273 45
Total ..	363 85	23,363 57	22,769 53	20,233 50	23,712 57	17,101 54	17,345 35	124,939 91

NOTE.—The sum of 124,939 sucres 91 c. realised 14,320*l.* 13*s.* 6*d.*, and the deficit, 4,420*l.* 6*s.* 6*d.*, was paid out of the public treasury.

* Amount collected during the second fortnight in April.

Supplementary Annex G.—Exports from Guayaquil to the United States for the Years 1892-93.

Articles.	Price.	1892.		Price.	1893.	
		Quantity.	Value.		Quantity.	Value.
Cinchona bark ..	..	..	£	£ s. d.	..	£
Cocoa ..	Quintal	21	63	3 0 0	19	57
Coffee ..	"	20,345	61,035	3 0 0	17,364	52,092
Hides, raw ..	"	7,855	25,529	3 5 0	7,764	25,233
Indiarubber ..	"	11,097	22,194	1 10 0	10,634	16,041
Ivory-nuts ..	"	4,402	24,211	4 10 0	3,803	17,113
Specie, &c. ..	Sueros	10,850	1,550	0 5 6	12,236	3,365
Sundries ..	Sterling	..	2,139	..	19,516	2,296
Total ..	..	..	136,754	..	..	116,534

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1268. Meshed	1½d.	1328. Paris	2d.
1269. Cadiz	2d.	1329. Paramaribo.. ..	1½d.
1270. Cherbourg	1d.	1330. St. Petersburg	2½d.
1271. Erzeroum	½d.	1331. Patras	1½d.
1272. Christiania	5d.	1332. Calais	2½d.
1273. Buda-Pesth.. ..	½d.	1333. Loanda	1d.
1274. New York	3d.	1334. Bordeaux	2½d.
1275. St. Petersburg	7½d.	1335. Taganrog	1d.
1276. Alexandria	1½d.	1336. Galveston	8½d.
1277. Tokio	2½d.	1337. Riga.. ..	2d.
1278. Bilbao	3½d.	1338. Batavia	1½d.
1279. Beyrout	6d.	1339. Boston	1½d.
1280. Peking	2½d.	1340. Baltimore	1½d.
1281. Salvador	1d.	1341. Havre	2½d.
1282. Malaga	4d.	1342. Vera Cruz	1d.
1283. Buenos Ayres	8½d.	1343. Saigon	1½d.
1284. Canton	1d.	1344. Stockholm	2d.
1285. Washington	4½d.	1345. Galatz	1½d.
1286. Warsaw	½d.	1346. Trebizond	1d.
1287. Peking	½d.	1347. Algiers	3d.
1288. Amsterdam.. ..	1d.	1348. Amapala	½d.
1289. Manila	2½d.	1349. Cherbourg	1d.
1290. Bahia	1d.	1350. Jerusalem	1d.
1291. Munich	1d.	1351. Santiago	1d.
1292. Trieste	1½d.	1352. San José	1d.
1293. Tunis	4d.	1353. Trieste	3½d.
1294. Montevideo.. ..	1½d.	1354. Madrid	2d.
1295. Belgrade	2d.	1355. Teneriffe	½d.
1296. Teneriffe	1d.	1356. Havana	2d.
1297. Stettin	3d.	1357. Paraguay	5d.
1298. Rome	2½d.	1358. Guayaquil	4½d.
1299. Dantzig	7d.	1359. Cadiz	1½d.
1300. Sofia.. ..	2½d.	1360. Marseilles	1½d.
1301. Mexico	1½d.	1361. Brest	1d.
1302. Paris	1d.	1362. Syra.. ..	2½d.

No. 1363.

Reference to previous Report, Annual Series No. 1206.

EGYPT.

SUAKIN.

Consul Barnham to the Earl of Kimberley.

My Lord, *Suakin, March 21, 1894.*
I HAVE the honour to forward herewith a Report upon the
Trade of Suakin for the year 1893.

I have, &c.
(Signed) HENRY D. BARNHAM.

Report on the Trade and Commerce of Suakin for the Year 1893.

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As regards the history of trade at Suakin during the past Trade year I have again to report that the country was disturbed by interrupted. raids at the commencement of the year, and that trade with the interior during the first three months was very insignificant. After the month of March the Berber road was open, and throughout the year caravans passed regularly to and fro.

The total trade of this port for the year 1893, shows a decrease Total decrease of 15,028%, the total for the year standing at 211,883% as against in value of 226,911% for the year 1892. trade.

Import Trade.

Decrease.

The import trade fell by about 15 per cent., but the exports, and especially the gum trade, showed a marked improvement. I find, as regards the imports, that the decrease is common to most articles of food, and as there has been no reduction in the population, it would appear that this is due solely to the existence of surplus stock, large quantities having been imported at the close of 1892. Of food consumed by the natives, dhourra has fallen off to the value of 8,564*l.*, and rice, 1,587*l.*; there has been a similar decrease in the import of food for the use of Europeans, such as preserved provisions and beer.

Manufactured cotton goods, on the other hand, show a slight improvement. It is, however, to be remarked that Manchester goods of this class have no market here, those imported being of Austrian or Italian origin, or native Indian fabrics. The following articles of import trade are included under the head of sundries: cotton seed, candles, carpets, cement, civet, cloves, rope, iron, and amarinds.

Exports.

Gum trade.

Gum takes the chief place in the table of exports, showing a total value of 56,855*l.* as against 43,796*l.* for the year 1892. It appears, however, that it was not a profitable season, as prices in Europe were uniformly low. The greater part of the gum was purchased here on commission, the merchants having lost too heavily in 1892 to risk their capital again by purchasing on their own account.

Very little business was done in senna, the amount exported being about one-half of that shown in my last report.

Under sundries are included sponges, mats, gold dust, whips, tortoise-shell, and goats' hair.

Sponges.

The sponge, as found in Suakin harbour, is of very inferior quality, those which are at all serviceable being exported to Greece, and there made up again in mixed parcels for the European market. It has been suggested that the class of sponge here might be improved by the introduction of spawn from the best known sponges in the Mediterranean.

Shipping.

17 steamers represented the total of British shipping which entered the port during the past year. These were Bombay and Persian Gulf boats with general cargoes. To these I add two steamers belonging to the Eastern Telegraph Company.

The Khedivial Steamship Company continues its fortnightly service from Suez, but it is much to be regretted that the state of trade does not permit some other company to enter into competition with them for their freights are exceptionally high, and their accommodation none of the best.

I had occasion to refer last year to the fall in the value of the Maria Teresa dollar. Two years ago the price of the dollar was 16 E. pias. or nearly 3s. 4d., it has now fallen to 10 pias. or a little more than 2s. Fall in Maria Teresa dollar.

A very profitable business is done by Jeddah merchants residing here, by exchanging this dollar for Turkish medjidiés, which are brought down from Berber by Jaaleen merchants. The price of the Turkish medjidié being 16 pias. and that of the dollar 10 pias., and the rate of exchange for 100 Turkish dollars being 114 Maria Teresa dollars, it follows that the money changer makes a profit of 460 Egyptian pias. or nearly 29 per cent. upon every transaction of that amount. For local trade the merchant of Berber or Omdurman deals with the Mahdi dollar, but as that coin would not be recognised at Suakin, he must, if he wishes to buy goods from here, exchange his Mahdi dollars at the Beit ul Mal for Turkish medjidiés at a large loss, and on arrival at Suakin is under the necessity of exchanging the medjidié for the Maria Teresa dollar wherewith to purchase goods from the Indian merchants. More than 200,000 Turkish medjidiés have found their way down here from Berber during the past year. Exchange of Turkish medjidiés for Maria Teresa dollars.

As regards the attitude of the dervishes towards trade, I would mention that while they appear to be anxious to encourage it, none but Arab merchants are allowed to enter their territory. A Jewish trader of Suakin proceeded to Berber with goods last autumn, and has recently returned unharmed, but with his goods intact, as he was not allowed to trade. Attitude of Dervishes towards trade.

There has been very little rain throughout the Soudan and Abyssinia, and it is feared that this year there will be great scarcity and probably suffering among the Arabs in the interior, as there have been no winter crops. Prospects for coming season.

EGYPT.

RETURN showing the Quantity and Value of Goods Imported into Suakin during the Year 1893, the Countries from which they were Exported, and the Total Value of Imports.

Articles.			Austria.		Egypt.		England.		France.	
			Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.
Barley	..	..	..	£E.	75,075	£E.	..	£E.	..	£E.
Beans and lentils	..	..	..	..	119,744	300	..	..	..	..
Beer ..	..	..	1,296	48	2,503	597	..	220	..	..
Cattle ..	..	..	..	..	..	107	3,052	..	..	..
Clothing ..	..	..	..	..	1,321	..	..	..	..	..
Coal ..	..	..	..	..	..	509	..	..	..	..
Coffee ..	..	..	..	..	2,130	172	3,745	4,068	..	..
Dates ..	..	..	..	..	..	..	..	..	..	..
Difir ..	..	..	..	..	..	..	..	..	..	..
Fat ..	..	..	..	..	..	..	..	..	..	..
Dourra..	..	..	..	..	..	..	..	..	..	..
Fancy goods, cutlery	..	..	..	..	1,280	44	..	..	..	..
Flour ..	..	..	..	..	18,796	595	..	..	..	..
Ghee ..	..	..	..	..	48,541	867	..	..	..	..
Liquors ..	..	..	..	..	18,802	525	..	..	..	..
Lubiya (beans)	..	..	736	22	4,966	282	2,223	432	2,186	145
Mahlab ..	..	..	..	..	..	..	..	..	..	..
Millet..	..	..	..	..	12,617	461	..	..	..	..
Nakhala (bran)	..	..	..	..	247,954	992	..	..	..	..
Oils ..	..	..	..	..	54,154	232	..	..	..	..
	..	..	..	..	13,968	301	..	..	..	..

RETURN showing the Quantity and Value of Goods Imported into Suakin during the Year 1893, the Countries from which they were Exported, and the Total Value of Imports—continued.

Articles.	India.		Masowah.		Turkey.		Other Countries.		Total.	
	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Currency.	Sterling.
Barley	161,169	£E. 534	..	£E. ..	..	£E. ..	..	£E. ..	£E. 834	£ 875
Beans and lentils	53,601	279	..	..	..	..	..	..	876	898
Beer	..	..	..	..	..	..	1,106	48	423	434
Cattle	..	..	..	..	871	2,037	..	..	2,037	2,089
Clothing	..	..	..	..	..	..	..	..	509	522
Coal	2,381	187	..	..	..	..	..	..	4,068	4,172
Coffee	12,288	123	3,549	278	4,987	473	..	..	1,110	1,138
Dates	3,268	132	..	..	681,555	3,924	..	..	4,047	4,150
Difr	3,944,578	15,430	4,020	133	..	..	..	..	265	271
Fourm	17,885	422	..	..	1,049	27	..	..	15,430	15,826
Fat	1,600	129	1,500	27	166	15	..	..	493	506
Fancy goods, cutlery	466,110	5,187	..	..	..	..	..	..	766	785
Flour	..	..	..	..	..	..	..	..	6,054	6,209
Ghee	..	..	1,240	50	553	15	608	26	525	538
Liquors	7,500	40	..	..	66,879	302	..	..	972	997
Lubiya (beans)	..	..	..	..	..	..	..	..	342	351
Mahlab	..	..	..	..	..	..	..	..	461	473
Millet	..	..	..	..	..	..	..	..	992	1,017
Nakhala (bran)	..	..	..	..	..	..	..	..	232	238
Oils	57,780	1,512	167	12	1,382	41	..	..	1,866	1,914
Petroleum	..	..	..	..	..	..	3,731	873	873	893

RETURN showing the Quantity and Value of Goods Imported into Suakin during the Year 1893, the Countries from which they were Exported, and the Total Value of Imports—continued.

Articles.	India.		Masowah.		Turkey.		Other Countries.		Total.
	Quantity.	Value. £R.	Quantity.	Value. £R.	Quantity.	Value. £R.	Quantity.	Value. £R.	
Potatoes	..	..	..	..	..	..	..	..	£
Preserved provisions	15,936	188	..	26,223	..	256	..	1,173	1,203
Printed cotton goods	231,307	21,385	2,901	81	..	8	..	3,785	3,882
Rice	193,888	2,978	..	..	..	102	..	57,605	59,082
Sandal wood..	4,911	142	..	..	..	..	..	3,412	3,500
Scents	2,699	670	..	..	..	..	..	142	146
Sesame	20,654	186	..	..	..	..	..	1,080	1,107
Sheep and goats	..	..	..	..	1,555	14	..	200	205
Skins of musk rat (soudeli)	..	..	..	..	418	145	199	294	301
Soap	134,152	199	..	..	6,515	13	..	212	218
Spices	..	..	15,250	380	..	..	..	1,304	1,236
Spices	4,076	92	..	..	..	..	..	208	213
Bags	..	..	..	..	..	..	..	510	523
Straw..	10,733	155	..	..	..	..	..	4,842	4,966
Sugar..	3,577	291	..	..	..	..	..	319	327
Tea	5,014	368	..	..	..	..	..	771	790
Timber	..	..	..	..	..	..	..	2,590	2,656
Tobacco	..	..	..	..	..	..	..	406	416
Kilos.	..	..	3,715	42	30,325	128	..	11,250	11,538
Vegetables	..	..	..	..	..	..	..	..	..
Sundries	..	..	..	..	..	..	..	..	..
Total value ..	..	..	..	..	..	..	..	133,178	136,805

RETURN showing the Quantity and Value of Goods Exported from Suakin during the Year 1892, and the Countries to which they were Exported.

Articles.	Austria.		Egypt.		England.		France.	
	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.
		£E.		£E.		£E.		£E.
Cotton	..	636,034	..	..	..	865,834	..	..
Gun	..	..	..	..	..	29,162	14,658	491
Ivory	..	..	..	..	..	513	..	..
Mother-of-pearl	..	8,922	..	..	..	602	..	..
Ostrich feathers	..	13	..	..	..	226	..	..
Senna	..	31,832	219,280	1,739	..	268	..	..
Skins	..	..	..	..	..	..	..	..
Sundries	..	..	..	..	..	..	..	..
Articles.	India.		Massowah.		Other Countries.		Value.	
	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Currency.	Sterling.
		£E.		£E.		£E.		£
Cotton	167,060	2,213	36,597	1,682	638	44	£E.	4,040
Gun	127,386	4,487	381	11	396	13	55,434	56,855
Ivory	50,944	3,735	..	..	..	..	4,248	4,357
Mother-of-pearl	23,928	1,434	..	..	..	..	2,494	2,557
Ostrich feathers	..	..	..	..	..	..	243	249
Senna	..	..	..	..	..	..	2,278	2,337
Skins	10,400	408	..	..	..	..	408	418
Sundries	..	..	..	..	..	..	3,353	4,465
Total value	..	..	..	..	..	..	73,397	75,278

SUAKIN.

9

RETURN showing the Total Value of Imports and Exports at the Port of Suakin during the Years 1892-93, the Total Value of Trade in each Year and Total Decrease in 1893.

Total Value of Import Trade.		Total Value of Export Trade.		Total Value of Trade.		Total Decrease.
1892.	1893.	1892.	1893.	1892.	1893.	1893.
£ 159,647	£ 136,605	£ 67,214	£ 75,278	£ 226,911	£ 211,883	£ 15,028

RETURN showing the Total Value of Trade at Suakin during the Year 1893.

Description.	Value.	
	Currency.	Sterling.
Imports	£E. 133,178	£ 136,605
Exports	73,397	75,278
Total	206,575	211,883

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EGYPT.

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ON THE
TRADE OF THE CONSULAR DISTRICT OF
PORT SAID.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1259.

*Presented to both Houses of Parliament by Command of Her Majesty,
AUGUST, 1894.*

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1356. Havana	2d.	1415. Fiume	2d.
1357. Paraguay	5d.	1416. Athens	6d.
1358. Guayaquil	4½d.	1417. Soul	1½d.
1359. Cadiz	1½d.	1418. Beyrout	1d.
1360. Marseilles	1½d.	1419. Berlin	1½d.
1361. Brest	1d.	1420. Nice	3d.
1362. Syra	2½d.	1421. Yokohama	1½d.
1363. Suakin	1d.	1422. Maracaibo	1d.
1364. Callao	1d.	1423. Tunis	1½d.
1365. Piræus	2d.	1424. Baghdad and Bussorah	1d.
1366. Stettin	2d.	1425. Rio Grande do Sul	7d.
1367. New Orleans	2½d.	1426. Erzeroum	1d.
1368. Angora	1d.	1427. Christiania	5½d.
1369. Antwerp	2d.	1428. Charleston	5½d.
1370. Genoa	3½d.	1429. Meshed	1d.
1371. Batoum	2d.	1430. Copenhagen	½d.
1372. Rouen	2½d.	1431. Galveston	2½d.
1373. Santo Domingo	½d.	1432. Hamburg	2½d.
1374. Nantes	1½d.	1433. Brindisi	2½d.
1375. Taganrog	2½d.	1434. Gothenburg	2d.
1376. Ispahan	4½d.	1435. Kiungchow	1d.
1377. Leghorn	2d.	1436. St. Petersburg	½d.
1378. Cagliari	1d.	1437. Malaga	1d.
1379. Boston	1d.	1438. Chicago	2½d.
1380. Palermo	3d.	1439. Odessa	2d.
1381. New York	2d.	1440. Tabreez	½d.
1382. Zanzibar	2d.	1441. Tahiti	½d.
1383. Naples	1½d.	1442. Shanghai	2d.
1384. Constantinople	2d.	1443. Nagasaki	1d.
1385. Buenos Ayres	5½d.	1444. Madrid	2½d.
1386. Caracas	1½d.	1445. Malaga	2½d.
1387. Vienna	1½d.	1446. Rotterdam	1d.

No. 1447.

Reference to previous Report, Annual Series No. 1259.

EGYPT.

PORT SAID.

Consul Gould to the Earl of Kimberley.

My Lord,

Port Said, July 13, 1894.

I HAVE the honour to forward to your Lordship a Report on the Trade and Commerce of Port Said for 1893, together with a Report by Mr. Vice-Consul Norrish on the Trade and Commerce of Suez.

I have, &c.
(Signed) G. B. GOULD.

Report on the Trade and Commerce of Port Said and Suez for the Year 1893.

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Imports.

Coal.

The total import of coal for the year 1893 amounted to 940,755 tons, being less than the year 1892 by 78,899 tons. The total shipping is less than 1892 by 1,127,702 tons; hence the falling-off in the coal import, which is mainly for the supply of the passing shipping.

Of these 940,755 tons the Suez Canal Company absorbed, for local consumption, 9,254 tons; the local gas company, 1,318 tons; and 6,000 tons were taken by local Arab dealers and distributed in the neighbouring country. The remainder, viz., 924,183 tons, was for the supply of the passing shipping.

The custom-house duty chargeable on coal sold for internal consumption is 8 per cent. A duty of 1 per cent. only is charged on coal merely deposited for the supply of ships.

Petroleum.

The following are the figures for the last 4 years' import of petroleum :—

Year.	Quantity.
	Cases.
1890	112,702
1891	115,028
1892	143,045
1893	300,291

There is here shown a steady and rapid increase in the import of this article.

A Government store is under discussion, to enable the safe deposit of quantities of petroleum here. At present the importers send it at once to their own depôts in the interior. With facilities for dealing with petroleum here a still further increase in the import may be expected.

Frozen meat.

The import of frozen meat from Australia continues to increase.

Building materials.

There is a considerable import of wood (chiefly from Austria)

and of bricks and cement this year; however, there is not quite so much as last year, indicating, perhaps, an approaching pause in the building of new houses, which however has not yet outstripped the demand.

There is a distinct increase in the amount passing through the customs, indicating, I think, greater efficiency in the coastguard and customs services rather than any real increase in trade.

Trans-shipment Trade.

The trans-shipment trade here increases. Coffee, tea, pepper, spices, ginger, cotton, gunny-bags, hides, and tobacco brought from the East are trans-shipped here for redistribution among the Mediterranean and Black Sea ports. Dates are brought from Bussorah in considerable quantities, and are re-shipped to Syria and Turkey. I have not as yet been able to obtain reliable detailed statistics of the trans-shipment trade, but, judging from the increasing activity apparent in the part of the harbour devoted to this trade, I believe that the increase is very considerable, and I hope in future to be able to supply further statistics on the subject.

Canal Traffic.

The total number of vessels transiting the canal in 1893 was 3,341, of which 2,405 were British.

The following two tables show the figures for 1893 and the two preceding years :—

TABLE showing the Number and Tonnage* of Vessels Transiting the Canal during the Years 1891–93, divided according to Nationality.

Nationality.	1891.		1892.		1893.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
American ...	1	619	2	1,253	3	6,526
Austrian ...	51	169,399	61	191,144	71	251,467
Belgian ...	...	...	4	7,429	1	2,546
Brazilian ...	...	...	...	...	1	1,119
British ...	3,217	9,484,608	2,581	8,101,904	2,405	7,977,727
Chinese ...	...	...	2	3,455	...	...
Danish ...	1	963	...	...	...	...
Dutch ...	147	369,346	177	433,542	178	443,147
Egyptian ...	1	294	2	2,462	5	7,466
French ...	171	616,964	174	635,685	190	702,634
German ...	318	870,548	292	809,013	272	798,929
Greek ...	5	4,570	6	13,845	...	...
Hawaiian ...	...	...	...	...	...	...
Italian ...	116	275,861	74	198,205	67	183,492
Japanese ...	6	12,794	3	5,941	1	2,846
Norwegian ...	55	114,015	66	146,324	50	119,615
Ottoman ...	40	60,019	43	66,239	34	55,406
Portuguese ...	29	74,798	23	74,830	10	17,398
Russian ...	21	64,554	22	74,553	24	82,767
Siamese ...	...	...	1	2,228	...	...
Spanish ...	28	98,627	26	98,240	29	100,706
Total ...	4,207	12,217,980	3,559	10,866,492	3,341	10,753,790

* Danube measurements.

TABLE showing the Percentage of the Total Traffic through the Canal during the Years 1891-93, under the various National Flags.

Nationality.	1891.		1892.		1893.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
American ...	0·02	0·01	0·06	0·01	0·09	0·06
Austrian ...	1·21	1·39	1·71	1·76	2·12	2·34
Belgian ...	...	...	0·11	0·07	0·03	0·02
Brazilian ...	...	...	...	...	0·03	0·01
British ...	76·47	77·63	72·52	74·56	71·98	74·18
Chinese ...	...	...	0·06	0·03	...	...
Danish ...	0·02	0·01	...	...	...	...
Dutch ...	3·49	3·02	4·97	3·99	5·33	4·12
Egyptian ...	0·02	0·002	0·06	0·02	0·15	0·07
French ...	4·07	5·05	4·89	5·85	5·69	6·53
German ...	7·56	7·12	8·20	7·44	8·14	7·43
Greek ...	0·12	0·04	0·17	0·13	...	...
Hawaiian ...	...	...	...	...	...	...
Italian ...	2·76	2·26	2·08	1·82	2·00	1·71
Japanese ...	0·14	0·10	0·08	0·05	0·03	0·03
Norwegian ...	1·31	0·93	1·85	1·35	1·50	1·11
Ottoman ...	0·95	0·49	1·21	0·61	1·02	0·52
Portuguese ...	0·69	0·61	0·65	0·69	0·30	0·16
Russian ...	0·50	0·53	0·62	0·69	0·72	0·77
Siamese ...	...	...	0·03	0·03	...	...
Spanish ...	0·67	0·81	0·73	0·90	0·87	0·94
Total ...	100·00	100·00	100·00	100·00	100·00	100·00

The next table shows the total number of vessels which entered the harbour of Port Said during the last 5 years.

TABLE showing the Number and Classification of Vessels Entering the Harbour of Port Said, and Transiting the Canal or otherwise.

Year.	Number of Vessels which Entered the Harbour of Port Said.			Vessels which Transited the Canal.	Vessels which did not Transit the Canal.
	Steamers.	Sailing Vessels.	Total.		
1889 ..	4,192	36	4,228	3,425	803
1890 ..	4,267	49	4,316	3,389	927
1891 ..	6,266	30	6,296	4,207	2,089*
1892 ..	4,195	20	4,215	3,559	656
1893 ..	4,024	20	4,044	3,341	703

* It is doubtful if these figures can be correct as no reason can be found for the abnormal number of vessels which appear as having entered the harbour, but as not having transited the canal in 1891. Application has been made to the Canal Company here for an explanation, but without result. It is probable that the figures, which are taken from returns made up in Paris, include small coasters not usually shown in the returns, or else that there is a clerical or printer's error. The corresponding figures given by the post office here for 1891 are 763.

The principal entire cargoes homeward have been—

Principal
entire cargoes.

Articles.	Quantity.		
	1891.	1892.	1893.
	Tons.	Tons.	Tons.
Rice	640,350	682,776	577,750
Wheat	513,100	289,370	132,100
Sugar	233,300	231,815	320,740
Oil seeds	161,700	144,130	148,780
Tea	79,700	50,800	77,968
Wool	69,800	109,800	122,600
Jute	65,800	90,800	68,500
Cotton	7,000	20,600	..

The principal entire cargoes outward were—

Articles.		Quantity.		
		1891.	1892.	1893.
Petroleum	Cases ..	275,764	303,847	455,430
Rails	Tons ..	60,901	53,400	44,000
Salt	" ..	29,700	17,100	..
Marine cable	" ..	11,000	..	6,950
Cement	" ..	..	3,000	3,000

The percentage of ships using the electric light to pass through the canal have been as follows :—

Use of the
electric light.

Year.						Per Cent.
1890..	..	..	..	..	..	83
1891..	..	..	..	..	..	88
1892..	..	..	..	..	..	90
1893..	..	..	..	..	..	92

The average time occupied in passing through the canal was, in 1893 :—With the electric light, 19 hours 52 minutes; without the light, 31 hours 24 minutes. The time occupied in transit slowly but steadily decreases.

Out of the 3,341 ships which passed through the canal in 1893, 2,300 had a draft of under 23 feet 4 inches; 985 drew between 23 feet 4 inches and 26 feet; and 56 had the maximum draft of 26 feet.

The following table shows the comparative draft of vessels during the last years. The figures show a marked tendency to use ships of larger draft :—

COMPARATIVE Draft of Water of Ships Transiting the Canal
during the Years 1891-93.

Draft.	Number of Vessels.		
	1891.	1892.	1893.
Maximum depth allowed, 26 feet or 7.80 metres	35	32	56
Between 23 feet 4 inches or 7 metres; and 26 feet or 7.80 metres	985	918	985
Under 23 feet 4 inches or 7 metres	3,187	2,609	2,300
Total	4,207	3,559	3,341

Record of rapid coaling. Last year the "Moyune," the first tea ship to pass, was reported to have loaded 520 tons of coal in 65 minutes. This year, 1893, the same ship, on May 27, loaded 560 tons in 1 hour 15 minutes.

The following are some of the quickest mails delivered :—

TABLE showing the Shortest Time Mails were Delivered.

Between—	Time.	Vessel.	Date.
	Days hrs. m.		
London and Bombay ..	14 2½ 0	"Oriental" ..	April 14, 1893
" " ..	13 1 0	"Himalaya" ..	Nov. 12, 1893
Brindisi and Bombay ..	10 20 0	"Himalaya" ..	Nov. 12, 1893
London and Hong-Kong ..	24 0 0	"Oriental" ..	May 4, 1893
London and Adelaide ..	26 16 30	"Australia" ..	May 4, 1893
" " ..	26 6 0	"Himalaya" ..	June 15, 1893

The following are the average passages made by the mails by different companies :—

Between—	Time.	By.	Remarks.
	Days hrs. m.		
London and Melbourne ..	32 9 11	Peninsular and Oriental	} Average during year
	33 8 39	Orient	
	35 0 0	Norddeutscher	
Melbourne and London ..	32 4 2	Peninsular and Oriental	} Average during year
	32 8 58	Orient	
	36 0 0	Norddeutscher	

The following is a return of the passenger traffic for the year 1893. Passenger traffic.

RETURN of the Passenger Traffic during the Year 1893.

Passengers.	Entered from—		Total.
	Port Said.	Suez.	
	Number.	Number.	Number.
Soldiers—			
British	14,681	13,453	28,134
Dutch	2,261	3,003	5,264
French	7,711	6,357	14,068
German	307	404	711
Italian	1,570	1,564	3,134
Japanese	..	197	197
Ottoman	6,909	8,049	14,958
Portuguese	374	132	506
Russian	2,222	942	3,164
Spanish	1,448	296	1,744
Total	37,483	34,397	71,880
Other passengers	56,522	52,030	108,552
Grand total	94,005	86,427	180,432

The following table gives an epitome of the receipts of the Suez Canal Company for the last 3 years. Receipts of the Suez Canal Company.

Receipts.	Value.		
	1891.	1892.	1893.
	Francs.	Francs.	Francs.
SERVICE DE TRANSIT.			
Receipts from ships	83,422,101	74,452,436	70,667,361
„ boats	172,078	134,749	129,482
Sundry receipts	321,107	298,136	281,966
SERVICE DU DOMAINE.			
Sale of land	217,269	407,682	309,232
Rent of land	138,432	132,824	133,922
Sale of buildings	27,178	16,769	7,528
Rent of buildings	242,427	263,957	221,139
Sundry receipts	..	..	105
RECETTES ACCESSOIRES.			
Water supply	425,525	452,466	386,182
Steam tramway—			
Port Said, Ismailia	..	..	18,476
Service des Travaux	15,903	15,699	34,001
Total	84,982,020	76,174,718	72,189,394

General Remarks.

Town of
Port Said
building.
High price of
water.

Building continues, but the progress of the town is checked by the enormous price charged by the Canal Company for fresh water. The charge for unfiltered water is 1 fr. 50 c. per cubic meter, or about 1s. 3d. a ton. It was hoped that when the fresh water canal was brought down to Port Said the charge for water would be reduced. This hope has not been realised, and the only difference observable is that the water now supplied to the town is of worse quality than before, being now often brackish.

Waterworks.

Extensive works for filtering and storing the new supply of water are in progress.

In my last year's report I remarked on the immense benefits which would be conferred upon this town and environs by a liberal supply of good water at a reasonable rate, and it is a matter of great regret that the hope of the residents of Port Said in this matter are still unrealised.

New railway
line.

On December 2 the new railway line from Ismailia to Port Said was opened by H.H. the Khedive in person. This line is a Decauville railway of 77 centimeters gauge. It is thereof only adapted for light passage traffic. The trains are well appointed, and shorten the journey to Ismailia by about 1 hour. Should this line prove the precursor of a serious railway, adapted for goods as well as passenger traffic, a considerable impulse to the trade of this place will be the result. As it is, it will prove a convenience to passengers between this and other parts of Egypt.

SUEZ.

Mr Vice-Consul Norrish reports as follows :—

The general trade at the port of Suez in the year 1893 shows an increase on that of the preceding year, viz. :—

Customs
revenue.

The revenue of the Suez Customs during the year amounted to 61,300*l.*E., as against 58,488*l.*E. in the year 1892, showing an increase of 2,812*l.*E. in 1893, being respectively the highest collections on record.

The following statement shows the comparison between the years 1892 and 1893, and the sources from where the revenue at Suez is derived :—

					Amount.	
					1892.	1893.
					£E.	£E.
Imports	..	..	..	..	54,370	56,196
Tobacco	..	..	..	..	2,006	3,190
Exports	..	..	..	..	221	241
Other items	..	..	..	..	1,891	1,673
Total	..	..	..	..	58,488	61,300

The revenue of the Suez customs in the year 1877 was 30,330*l*.E.; and in 1893 it amounted to 61,300*l*.E.

The total value of all articles imported at Suez during the year Imports. 1893, as given in the customs statistics, amounted to 777,212*l*.E., as against 750,000*l*.E. in the year 1892, showing an increase of 27,212*l*.E. in 1893.

The export trade of 1893 shows a slight increase, the value of Exports. articles exported is put down at 51,853*l*.E. as against 50,000*l*.E. in the year 1892.

Shipping and Navigation.

The total number of British vessels which transited the Suez Canal in 1893, as given in the general return of the Suez Canal Company, was 2,405 vessels with a net tonnage of 5,752,934 tons; besides this number there were 39 British men-of-war with a net tonnage of 82,946 tons.

The total number of vessels of all nationalities which passed through the Suez Canal during the same year is given at 3,341 vessels with a net tonnage of 7,659,068 tons.

During the year 1893 there were only nine casualties registered at the British Vice-Consulate of vessels having grounded or collided in transiting the Suez Canal.

The dry dock at Suez was used by nine vessels, viz. :—

4 British merchant steamers; 2 Turkish Government corvettes; 1 Italian despatch vessel; 1 Italian merchant vessel; 1 Dutch merchant vessel.

The following return shows the exact number of vessels duly registered at the various consulates at Suez during the year 1893 :—

RETURN of all Shipping at the Port of Suez registered at the different Consulates during the Year 1893.

ENTERED.

Nationality.	Steam.	
	Number of Vessels.	Tons.
British	32	42,388
Egyptian (Khedivieh Administration)	87	54,201
French (Messageries Maritimes) ..	52	160,074
Austrian	30	77,078
Italian	26	49,374
German (mail steamers)	27	80,165
Russian (Volunteer Fleet Society) ..	10	26,692
Total	264	489,972

CLEARED.

Nationality.	Steam.	
	Number of Vessels.	Tons.
British	32	42,388
Egyptian (Khedivieh Administration)	86	53,578
French (Messageries Maritimes) ..	52	160,074
Austrian	30	77,078
Italian	27	51,273
German (mail steamers)	28	79,602
Russian (Volunteer Fleet Society) ..	9	25,252
Total	264	489,245

The pilgrim traffic this year as given by the local authorities was more than double of that in 1892.

RETURN giving the Number of Pilgrims, with their respective Nationalities.

Nationality.	Number of Pilgrims.
Egyptians	14,310
Mogabees	11,722
Turks	10,961
Hindoos	47
Bakharas	702
Persians	1,088
Russians	1,809
Syrians	3,593
Total	44,232

The above total includes those that came through the Suez Canal, and those embarked at Suez, viz.:—

	Number of Pilgrims.
From the Canal	25,301
Embarked at Suez	18,931
Total	44,232

Coals.

The quantity of coal imported at Suez during the year 1893 was considerably more than that in 1892, and amounted to 11,456 tons; out of this quantity the Postal Khedivial Company alone landed 7,336 tons.

STATEMENT showing the Quantity of Coa Imported at Suez during the Years 1891-93.

Year.						Quantity.
						Tons.
1891..	..	..	..	..	..	14,763
1892..	..	..	..	..	..	6,925
1893..	..	..	..	..	..	11,456

There has been a rapid improvement in this trade during the year. Gunnies to the value of 139,414*l*.E. were imported in the year 1893, as compared with 103,767*l*.E. in 1892, showing an increase of 36,647*l*.E. in 1893.

There has been a slight falling-off in the import of this article Coffee. during the year, the value of coffee imported amounted to 247,964*l*.E., as against 254,918*l*.E. in the year 1892, showing a decrease of 6,974*l*.E. in 1893.

During the year 1893 the number of head of cattle was almost equal to that in 1892, the value being 11,469*l*.E. as compared with 11,619*l*.E. in 1892.

There were 14,370 kilos. of tobacco under the various denominations imported at Suez in 1893. Tobacco.

The trade in this fuel is increasing yearly, the quantity of charcoal imported in 1893 was 2,265 tons against 1,233 tons in the year 1892.

The trade in timber has not been so brisk as in the year 1892, there being no great demand at present for this article. Timber. The revenue of timber imported during the year was 1,200*l*.E.

The population of Suez may be put down as about the same as that of last year, no census has yet been taken by the local authorities. Population and industries.

There are four schools in Suez, one of which is a primary Arab school, and three foreign schools. There are also two schools at Port Teufik, one for males and another for females, under the management of the Frères des Ecoles Chrétiennes and the Sisters of Mercy respectively. Schools.

There is very little to record under this head; the project for the building of a quay on the foreshore of the town of Suez and referred to in my former reports has, I regret to say, been laid aside. Public works.

The Egyptian Government has built a new jetty for the Bonded Warehouse Company to land their goods on at Suez, and the company is now erecting on it a steam crane, so as to accelerate the landing of large quantities of heavy bales. This jetty is also open to the public as a landing place, but the Warehouse Company has the exclusive right to land or ship merchandise on it.

General Remarks.

The Bonded Warehouse Company, Limited, reports a very considerable increase in its operations during the year 1893. Merchants are now beginning to realise the advantage of bonding their goods pending improvement of markets, since they are able to obtain advances from the company on their goods. The large warehouse built at Suez early in the year has proved inadequate for the increasing demand for storage accommodation, and the company is now erecting two more sheds adjacent to it of the measurement of 125 feet by 25 feet each.

Bales of gunnies imported from Calcutta form the chief articles stored in the company's warehouse, and the stock of gunnies stored at the end of 1893 was more than three times the stock in 1892. Large quantities of gum from Suakin have also been stored during the year 1893, pending a rise in the European markets, and as the Soudan traffic is more freely opened, a great development in this article is anticipated. A quantity of indigo from Calcutta has also been stored in bond during the year.

Notwithstanding the sanitary regulations in force, the town of Suez is in a most neglected and filthy state. The rules laid down are not bad, but they are in a great measure disregarded. The rubbish collected by native boys who go about the streets is merely swept into heaps from which they collect such débris as they can dispose of as fuel which is then sold to native bakers. The streets of Suez are still watered with brackish or salt water, although fresh water can be obtained from the water company at a reasonable rate.

A large fresh water condenser has lately been erected at Kosseir by the Egyptian Government capable of making 25 tons of fresh water per day.

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